

# ITALIAN AGRICULTURE IN FIGURES 2024



**Research Centre for Agricultural  
Policies and Bioeconomy**



#### **EDITORIAL COMMITTEE**

Maria Francesca Marras (chair), Simonetta De Leo, Sabrina Giuca, Luca Frascchetti, Roberta Sardone, Massimiliano Schiralli, Laura Viganò

#### **Subject experts**

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#### **ANALYSIS**

Fabio Iacobini

#### **GRAPHIC DESIGN AND PAGE LAYOUT**

Sofia Mannozi, Roberta Ruberto

#### **EDITORIAL COORDINATION**

Benedetto Venuto

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CREA, 2024



# **ITALIAN AGRICULTURE IN FIGURES 2024**

ROME, 2024

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# INTRODUCTION

Now in its 37th edition, "L'agricoltura italiana conta" (Italian Agriculture in Figures), published by the CREA Research Centre for Agricultural Policies and Bioeconomy, provides a snapshot of trends in the agricultural sector and of relationships between the primary sector and the rest of the economy, society and the environment.

In 2023, the economic performances of the agriculture, forestry and fishing sector recorded an increase in production value (+2%) from the previous year, with around €77 billion, against a significant drop in volume (-1.8%), mainly due to the negative trend of the agricultural production not compensated by the production results of forestry and fishing. The agricultural production recorded a sharp drop in the volumes of wine (-17%) and fruit (-11%). In decrease, to a lesser extent, the production of floriculture (-4%), olive oil (-3%) and the live-

stock sector (-1%). A favourable year, instead, for industrial plants (+10%), cereals (+7%) and secondary activities (+7%), the latter driven by the steady growth in renewable energy, farm processing especially of animal products, agritourism and direct sales. The decrease in volumes produced was also accompanied by a reduction in employment, with a drop in AWU (-2%), especially due to the loss of independent units (-4%).

The overall share of the sector within the national economic system has remained slightly above 2% of GDP, at current values. Similarly, the proportion of the agri-food system as a whole has remained constant at 15% of the economy as a whole, generating an overall value of €676 billion, with a 6% increase compared to 2022, thus confirming last year's growing trend. Among the components of the system, even in 2023, the most dynamic was

food service which, with a growth of around 12%, has completely recovered the pre-pandemic values, thanks to the resumption of eating out styles and tourist demand, in particular from overseas.

The increase in expenditure for foodstuffs and drinks is the highest in the last years (+9% compared to 2022), whereas the volumes shrank for most of the main agri-food products. As in 2022, the Italians were obliged to alter their purchasing habits in terms of foodstuffs, by limiting the quantity or quality of food purchased, affecting high-range products such as extra virgin olive oil and PDO hams, as well as highly processed products.

In 2023, foreign demand marked new heights for Italian agri-food trade, with exports exceeding €63 billion (+7%) and Made in Italy products rising to €46 billion, a growth of 8%.

Overall, this publication paints a clear

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picture for our agri-food sector, which is resisting against turbulence exogenous the sector: businesses are competing in an international market governed by great uncertainty, and production volumes are shrinking due to the effects of an increasingly unstable climate. There are also several endogenous factors that are likely to affect the near future of our agriculture. Firstly, there is growing interest among our farmers, especially women and young people, in side activities to the agricultural one, which are often considered more remunerative and a “shelter” compared to the production of goods. Secondly, the competition

in land use, both in relation to urban sprawl and its transformations and to the increasing interest in renewable energy investments, determines a careful evaluation about economic convenience in business growth strategies, with possible displacement effects in some production areas. This is also linked to demographic issues and the level of education of our farmers. The section on this topic highlights a strong ageing of businesses: more than 45% of farm managers are over 65 years old, while the youth component accounts for only 9% of the total. High ageing also negatively affects education levels: college graduates

do not exceed 10% of the total, while those who have attended agricultural training courses amount to 29% of the total.

Despite these important constraints, the summary section on Italy vs. the EU confirms, even for 2023, our country's excellent position within the Union's agri-food economy.

With thanks to the many researchers of the CREA (Council for Agricultural Research and Economics), many of whom belong to the Research Centre for Agricultural Policies and Bioeconomy, for their invaluable work in collecting and presenting the data.

*The director of CREA  
Research Centre for  
Agricultural Policies and  
Bioeconomy  
Alessandra Pesce*



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# BACKGROUND DATA

Area and population

Gross domestic product

Value added

Employment

Productivity

Bioeconomy

## AREA AND POPULATION

Italy is the 8th largest of the European countries in terms of land surface area (302,068 km<sup>2</sup>), with a high rate of agricultural land use (over 50% of the surface area).

The considerable latitudinal range makes the soil and climate characteristics of the Italian territory very diverse, favouring the development of highly diversified cropping systems.

However, agricultural land is undergoing a gradual and continuous decline due to the increase in artificial areas and the expansion of wooded and semi-natural areas (ISPRA).

At the same time, the structure of agricultural land is evolving, with periodic crops being replaced by permanent ones and the old structure of a dense network of small plots being transformed into large specialised single-crop areas.



**302,068 KM<sup>2</sup> SURFACE AREAS**

**8,300 KM COASTLINE**



**1,654,502 HECTARES  
ARTIFICIAL AREAS**

**12,535,358 hectares of UAA**



**7,199,415 hectares of  
Arable land (UAA 57%)**



**2,185,157 hectares  
of Permanent crops  
(UAA 17%)**



**Olives 994,318  
hectares**



**Vines 635,951  
hectares**



**Fruit 392,484  
hectares**



**Citrus 112,033  
hectares**



**Permanent pastures and  
grassland 3,136,555  
hectares (UAA 25%)**



**12,975,448 HECTARES  
FORESTS AND SEMI-  
NATURAL AREAS**

## TOTAL POPULATION AS OF JANUARY 10, 2024



**58,990 million**

## CITIZENSHIP

**58,990 million** ITALIAN **91%**  
FOREIGN **9%**

## FOREIGN RESIDENT POPULATION



**5,308 million**  
166 thousand  
**(+3.2%)** over the  
previous year

## FOREIGN RESIDENTS



**58.6%** of foreigners reside in  
the North  
**24.5%** in the Centre  
**16.9%** in the South

## OLD AGE INDEX (NO. ELDERLY INHAB./100 YOUNG INHAB.)



**199,8%**  
**+ 64%** negli ultimi venti  
anni

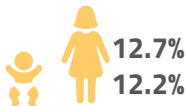


## AVERAGE AGE OF THE POPULATION

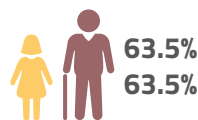
2022: 46.3  
2023: 46.6

## POPULATION BY AGE

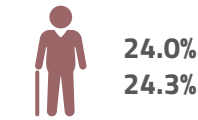
2022  
2023



0-14



15-64



65 AND OVER

# GROSS DOMESTIC PRODUCT

GDP at 2023 market prices grew by 6.5% over the previous year, reaching €2,128,001.4 million at current values, with an upward revision in the amount of €+42,625 million compared to the estimate carried out by ISTAT in March. Meanwhile, the increase in terms of volume came to 0.7%, that is 0.2% lower than the March estimate. The South of the country performed best, with a 1.3% increase in GDP volume, followed by the North-West, where growth stood at 1%, slightly above the national average.

Growth was mainly stimulated by domestic demand net of stocks, with an equal contribution from consumption and investment. In terms of volume, gross fixed capital formation increased by 4.7% and national final consumption by 1.2%. As far as foreign trade is concerned, imports recorded a decrease (-10.4%) while exports remained almost un-



GROSS DOMESTIC PRODUCT

Italy's GDP:  
**€2,128,001.4** million  
at current values  
**(+6.5%)**



Government debt over GDP  
comes to **€-152,735** million  
**(-7.2%** compared to 2022)



Public debt amounts  
to **134.6%** of GDP  
(drops)

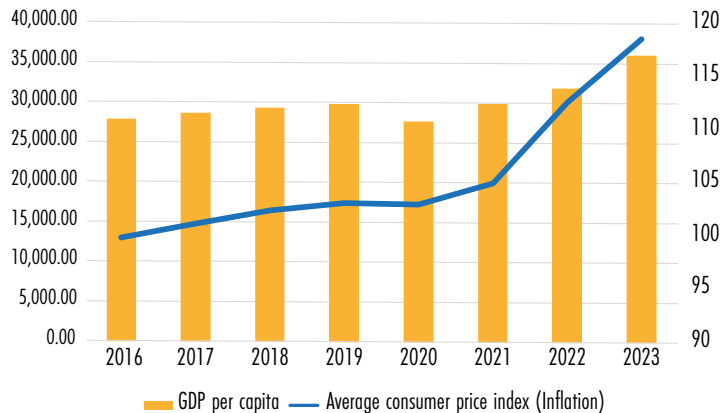


Tax-to-GDP ratio has  
dropped to **41.5%**



changed. GDP per capita also increased by 13%. When measured through the consumer price index, a growth of 5% in inflation is observed compared to the previous year. The government debt over GDP improved compared to 2022, while the tax-to-GDP ratio remained unvaried. The reduction in interest expenditure is reflected in an improvement in the primary balance. The government net borrowing over GDP was equal to -7.2%, in comparison with -8.6% in 2022. The primary balance (net borrowing minus interest expenditure) over GDP, was equal to -3.4% (-4.3% in 2022).

**GDP per capita overlaid with the average consumer price index**



Source: ISTAT.

## VALUE ADDED

In 2023, the value added by total economic activities at current prices grew by 6.4% compared to the previous year. In industry (without construction) the variation is positive (+3.6%), and even more so in construction (+5.5%) and services (+8.2%). However, the most significant increase was recorded in the food and drink industries, with a value at current prices of +20.3%. The total value in Euro of production in agriculture, forestry and fishing is around €77 billion, while the value added is €40.5 billion.

After the negative trend due to climate conditions and rising prices of inputs, the primary sector experienced a further deterioration in 2023, with a severe impact on the volumes of many productions and, above all, on production costs. Output and value added fall by 1.8% and



### VALUE ADDED IN THE ITALIAN ECONOMY

**€1,876,603 million**

**+6.4% AT CURRENT PRICES  
AND +1.1% IN VOLUME**



### VALUE ADDED IN AGRICULTURE, FORESTRY AND FISHING

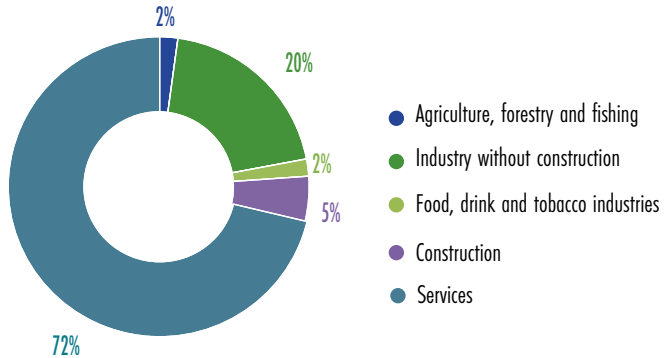
**€40,456 million**

**+7.6% IN VALUE AND  
-2.5% IN VOLUME**

2.5% respectively in real terms. Employment falls by 2.4%.

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### Value Added by sector , 2023



Source: ISTAT, National accounts

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## EMPLOYMENT

The workforce analysis carried out by ISTAT confirms, for the third year in a row, growth in the number of those employed in the entire Italian economy (+2.1%), due to the results recorded by services (+2.7%) and the industrial sector narrowly defined (+2%). The agriculture, forestry and fishing sector shows a 3.1% drop from the previous year.

Employment growth, driven by the permanent component of labour force and the positive results achieved by the South (+3.1%), enabled the full recovery of the pre-pandemic levels. In particular, growth in the South involved almost all production sectors except agriculture.

Over the past three years, the increase in labour market participation has affected all age groups of the population and, in particular, the more adult component (between the ages of 55 and 64). Despite some positive signals, important gender



### EMPLOYMENT THROUGHOUT THE ENTIRE ECONOMY

**23,580,000 (+2.1%)**

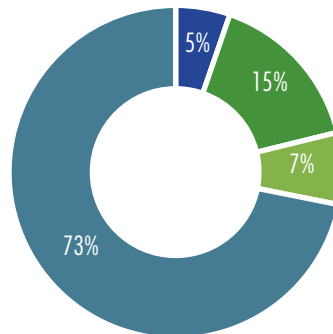


### EMPLOYMENT IN THE AGRICULTURAL SECTOR

**848,000 (-3.1%)**

gaps continue to be noted.

Total work units, 2023



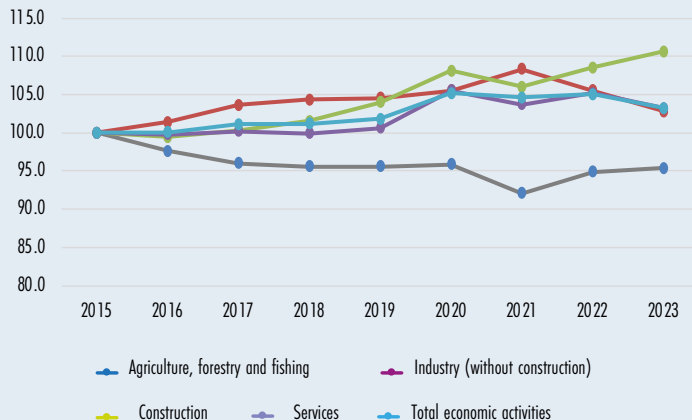
- Agriculture, forestry and fishing
- Industry (narrowly defined)
- Construction
- Services

Source: ISTAT, National accounts

## PRODUCTIVITY

The year 2023 is characterized by the stagnation of labour productivity, which for the total economic activities in Italy has marked a reduction of 1.7%. Over the past two decades, this has affected the weak GDP volume trend and widened the growth gap with other major EU economies. In volume, GDP per hour worked in Italy grew by 1.3% between 2007 and 2023, compared to 3.6% in France, 10.5% in Germany and 15.2% in Spain. The highest negative trend can be seen in industry (without construction) with -2.5%, followed by services -1.9%, while agriculture shows a slight positive variation (+0.5%) as does construction (+1.9%). At the EU level, labour productivity in agriculture in 2023 has France in first place (€96 billion, -1.1% compared to 2022), followed by Germany (€76.6 billion, +0.2%), Italy (€71.8 billion, +2.7%) and Spain (€65.5 billion, +3.3%).

Labour Productivity Index - value added at chain-linked basic prices per hour worked - indices 2015=100



Source: ISTAT

## BIOECONOMY

In 2023 in Italy, the set of activities related to bioeconomy generated a turnover of €437.5 billion and employment of around two million workers. 63.2 percent of this value comes from the agri-food chain, with an output of more than €276 billion. The agri-food chain is the most significant activity in all geographical areas with percentages ranging from 46% in the regions of Central Italy to 78% in the southern regions. The agri-food sector, in addition to guaranteeing nutritional needs and safeguarding health, biodiversity, and the environment, constitutes a primary source of biomass to be exploited both to produce bio-products (soil conditioners, bioplastics, biofuels, animal feed, etc.), and to replace traditional energy sources in power, transportation and heating. For example, the agri-food chain ensures the production of around 2.2 billion m<sup>3</sup> of biomethane and around 3 mil-



VALUE OF AGRI-FOOD CHAIN/TOTAL BIOECONOMY

**63.2%**



AGRICULTURE, FORESTRY AND FISHING  
represents **18.6%**  
with **€81,201 million**



THE FOOD, DRINK AND TOBACCO INDUSTRY  
represents **44.6%**  
with **€195,164 million**

lion tonnes of digestate (source CIB). It also contributes to the development of the bio-based industry by offering organic inputs (biomass, process-

ing waste, by-products, mowing and pruning).

## The value of the Bioeconomy in Italy

Production sectors	Production value (€ mln)			Weight %	2022 employment		2023 employment		22-23 employment
	2021	2022	2023	2023	Thousands	%	Thousands	%	Thousands
Agriculture, forestry and fishing	64,710	75,466	81,201	18.6	895	44.8	872	44	-23
Food, drink and tobacco	156,005	183,260	195,164	44.6	485	24.3	492	24.9	7
Bio-based textiles	9,580	11,203	10,682	2.4	51	2.5	49	2.5	-2
Bio-based clothing	13,260	16,191	17,357	4.0	95	4.8	83	4.2	-12
Bio-based tanning and leather goods/footwear	16,461	20,230	20,280	4.6	76	3.8	86	4.3	10
Wood and wooden products	15,736	18,868	16,177	3.7	91	4.5	89	4.5	-2
Paper and paper products	26,860	34,623	30,513	7.0	86	4.3	80	4.1	-6
Bio-based chemistry	3,792	4,500	3,885	0.9	9	0.4	8	0.4	-1
Bio-based pharmaceuticals	14,030	15,868	17,243	3.9	37	1.9	39	2	2
Bio-based plastic and rubber	1,523	1,752	1,618	0.4	5	0.3	5	0.2	0
Bio-based furniture	13,737	14,363	14,005	3.2	63	3.1	75	3.8	12
Bioenergy	3,301	6,151	1,974	0.5	2	0.1	2	0.1	0
Biofuels	1,8	1,6	ND	ND	ND	0	ND	0	ND
Water cycle	13,131	14,228	15,139	3.5	50	2.5	45	2.3	-5
Management and recovery of biodegradable waste	10,659	11,549	12,289	2.8	52	2.6	54	2.7	2
<b>BIOECONOMY TOTAL</b>	<b>362,788</b>	<b>428,254</b>	<b>437,527</b>	<b>100</b>	<b>1,996</b>	<b>100</b>	<b>1,981</b>	<b>100</b>	<b>-15</b>

Source: analysis of Intesa Sanpaolo's 10<sup>th</sup> Report "The Bioeconomy in Europe"



# LABOUR AND FARM MANAGERS

Salaried labour

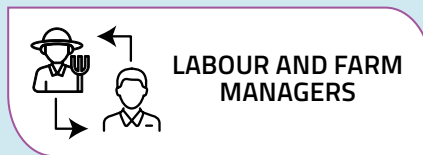
Foreign labour

Sociodemographic characteristics of farm managers

## SALARIED LABOUR

The 7th General Census of Agriculture, conducted by ISTAT in 2020, returned a total value of 1,277,062 workers in the salaried labour, representing around 47% of the total agricultural labour force. Compared to the previous census survey, the number of salaried labourers increased, while family labour decreased, which remains the predominant labour force in agriculture, though in evident decrease compared to the past. Salaried labour has seen a substantial increase in both the number of people (+38%) and the number of days worked (+37.5%).

At territorial level, the majority of salaried labourers are concentrated in the southern regions (56%), with Apulia accounting for approximately 21% of the total, followed by Sicily (12.6%) and Campania (over 8%). An analysis of the distribution of



### SALARIED LABOUR

1,277,062 WORKERS



### FARM MANAGERS



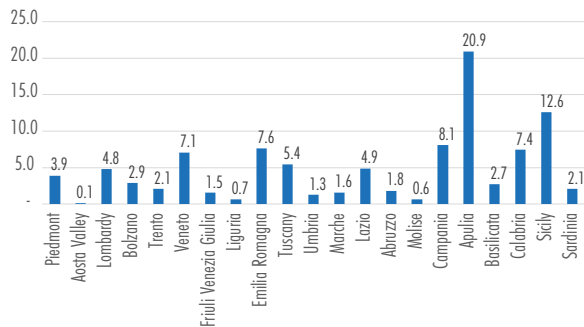
68.5% MALES, 31.5% FEMALES,  
41 TO 64 YEARS OLD (45.7%),  
65 YEARS OLD AND OVER (45.1%)



### EDUCATION

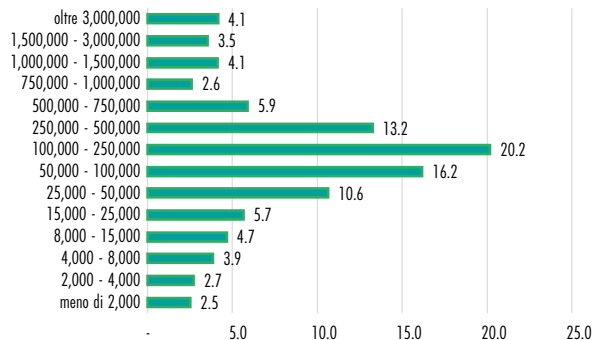
58% PRIMARY EDUCATION OR  
LOWER SECONDARY EDUCATION,  
10% TERTIARY EDUCATION

### Percentage distribution of salaried labour by region



Source: analysis of 7th General Census of Agriculture, ISTAT 2020

### Percentage distribution of the number of salaried workers by economic size (Standard Production class)



Source: analysis of 7th General Census of Agriculture, ISTAT 2020

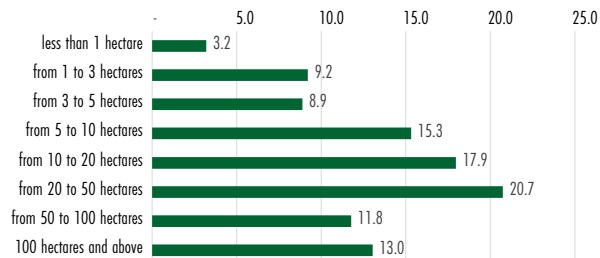
salaried labourers by farm economic size class shows a concentration of this type of labour force, particularly in the mid medium-large classes. In fact, around 50% of the salaried labour force is distributed in farms with a standard output ranging from €50,000 to €500,000, and within this

group, more than 33% of salaried labourers are employed by the largest ones.

A very similar situation is also evident in terms of the physical size of farms; in fact, again, a certain concentration of salaried labourers emerges from the census data

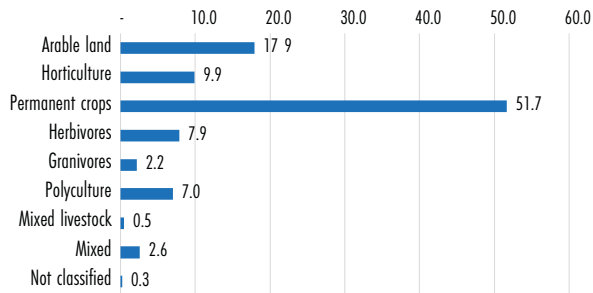
in medium to large farms. In fact, the highest percentages of the hired labour force on farms are found on those with a UAA between 10 and 100 hectares, although it should be noted that 54.5% salaried labourers are employed on farms with a UAA of up to 20 hectares.

### Percentage distribution of the number of salaried workers by UAA



Source: analysis of 7th General Census of Agriculture, ISTAT 2020

### Percentage distribution of salaried labour by type of farming (TF)



Source: analysis of 7th General Census of Agriculture, ISTAT 2020

Finally, in terms of production specialisation, it is evident that farms employing the highest number of salaried labourers are those engaged in the cultivation of permanent crops, including fruit, wine and

olive production. These farms account for over 50% of the total salaried labour force, with employment primarily concentrated on the harvesting phases of these crops. A significant proportion of the workforce

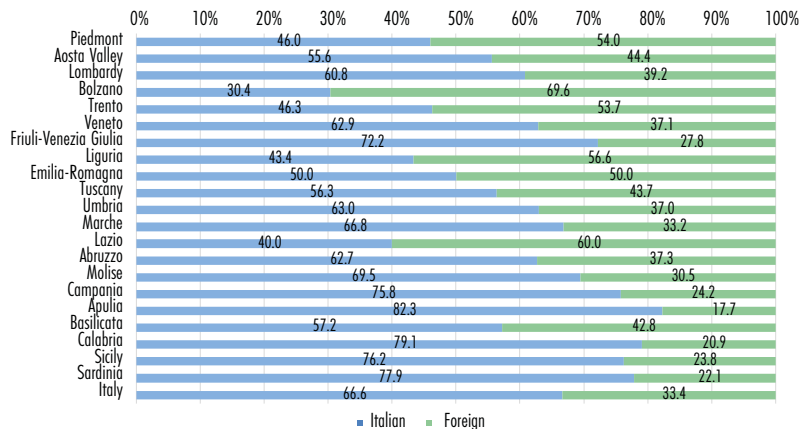
is employed in farms specialising in the production of arable land, followed by horticultural farms, which are notoriously labour-intensive activities.

## FOREIGN LABOUR

Within the agricultural salaried labour 33.4% are foreigners, 41% of whom come from EU countries and 59% from non-EU countries.

The foreign presence in some regions is very high compared to the national average, as, for example, in the province of Bolzano, where foreigners make up around 70% of the salaried labour force, or in Lazio, where this proportion reaches 60%. Other regions characterised by a significant proportion of foreign labour are Liguria (around 57%), the province of Trento and Piedmont, both with 54% foreign salaried labourers. In terms of economic size, the presence of foreign labourers increases across the board as the standard production class increases. Compared to the previous census there has been an increase in the foreign presence in the salaried labour, from 24% to 33%, and this growth has

Percentage composition of Italian and foreign salaried labour

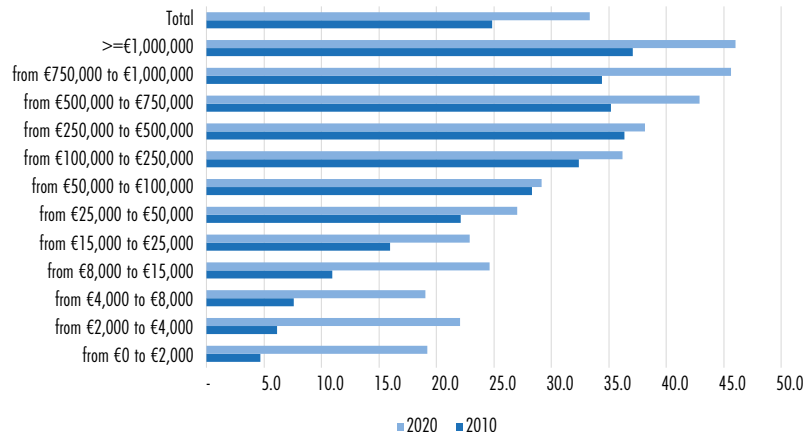


Source: analysis of 7th General Census of Agriculture, ISTAT 2020

been particularly marked in farms in the smallest size classes, in which foreign labour has in many cases more than doubled.

In terms of the physical size of the farms, in most cases the presence of foreign labour increases as the UAA class to which the farms belong

**Percentage proportion of foreign labour over total of salaried labour by economic size, comparison 2010 - 2020**

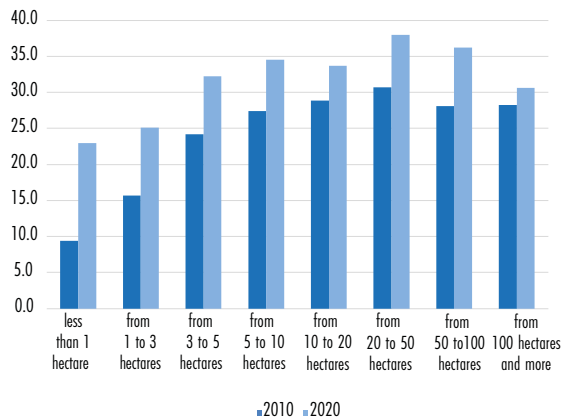


Source: analysis of 7th General Census of Agriculture, ISTAT 2020

increases. In all classes, compared to 2010, there is an increase in the presence of foreigners and, again, it appears more marked in the smaller size classes.

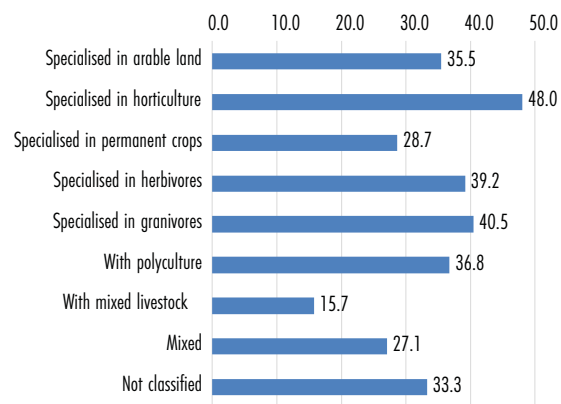
In terms of production specialisation, the highest foreign presence is found in farms specialised in horticulture, which are characterised by a high labour input and in which foreigners account for 48% of the total salaried labour. This is followed by farms specialised in granivorous livestock farming (40.5%) and, a short distance away, those with herbivores (39.2%).

**Percentage proportion of foreign labour in the total salaried labour by UAA, comparison 2010 - 2020**



Source: analysis of 7th General Census of Agriculture, ISTAT 2020

**Percentage proportion of foreign labour in the total salaried labour by TF**



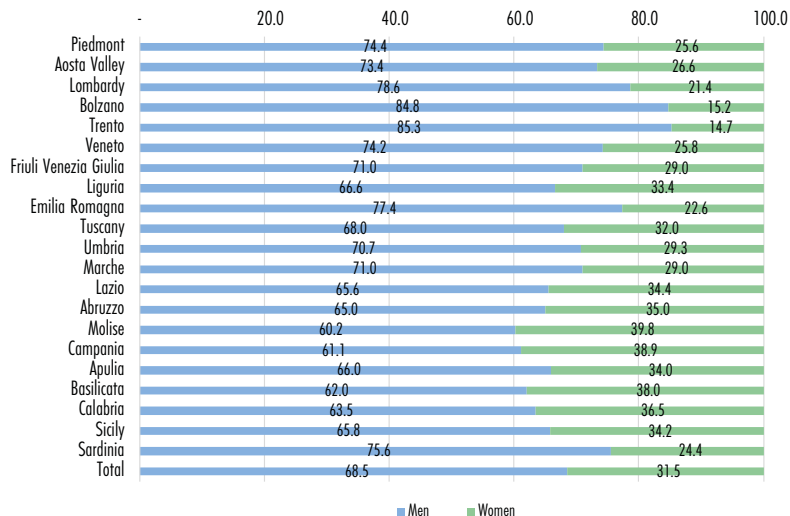
Source: analysis of 7th General Census of Agriculture, ISTAT 2020

## SOCIODEMOGRAPHIC CHARACTERISTICS OF FARM MANAGERS

### Sex

Italian farms, in the light of the 7th General Census of Agriculture, are predominantly run by men (68.5%) while female farmers account for 31.5%. This figure is fairly homogeneous throughout the country, although some regions stand out for an even more marked male presence, such as the provinces of Bolzano and Trento, where men make up 85% of the total, followed by Lombardy, with more than 78%, Emilia-Romagna and Sardinia, where the percentage of male farm managers is 77.4% and 75.6% respectively. On the other hand, Molise and Basilicata stand out for the presence of female farm managers accounting for 40% of the total.

Percentage proportion of the number of farms by region and sex of the farm manager

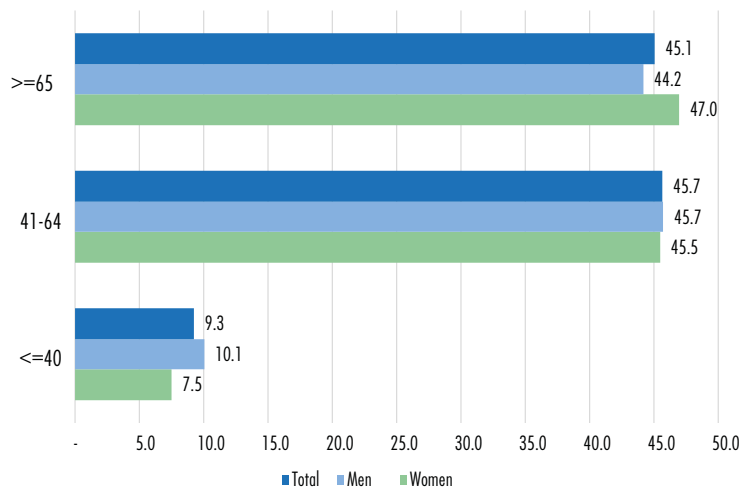


Source: analysis of 7th General Census of Agriculture, ISTAT 2020

## Age

In terms of farm distribution by age of the farm manager, the presence of rather aged farm managers continues to prevail, with a high percentage of 41-64 year olds (45.7%), with the older component (65 years and over) accounting for 45.1%. Young people, on the other hand, account for only 9.3% of the total, but when distinguishing by sex of the farm manager, in farms led by men this percentage is higher, albeit slightly (10.1%), while the older component is smaller. On the other hand, in farms ran by women, the presence of young people is lower, representing only 7.5% of the total, while the very elderly component is higher, recording the highest percentage (47%). At the regional level, encouraging data emerge regarding the presence of young people in some regions, such as Aosta Valley (16%), Sardinia (15%) and the provinces of Trento and Bolzano, where young farm

Percentage distribution of the number of farms by sex and age group of the farm manager



Source: analysis of 7th General Census of Agriculture, ISTAT 2020

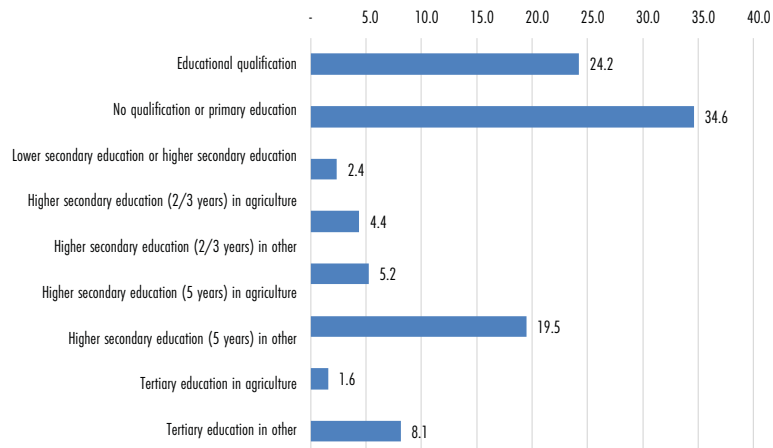
managers account for around 14% of the total.

## Training and education

In terms of training of farm managers, the agricultural census provides information on educational qualifications and training. The former shows a marked proportion of lower qualifications - primary education or lower secondary education - which alone exceed 58% of the total, followed by three-year and five-year higher secondary education, while the proportion of tertiary education is still low, representing less than 10% of the total.

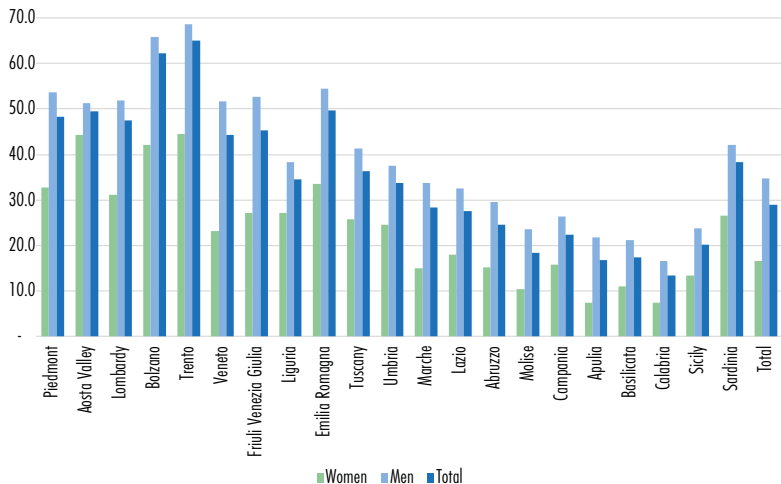
Finally, in terms of agricultural training, 29% of farm managers result to have attended related courses and the percentage is higher in the case of male farm managers (34.7%), while for female farm managers this aspect seems to be rather marginal, only 16.6% in fact having attended specific agricultural training courses. At the territorial level, some realities show particular attention to these training aspects,

Percentage distribution by educational qualification of the farm manager



Source: analysis of 7th General Census of Agriculture, ISTAT 2020

Percentage distribution of farm managers that have followed training courses by region and sex



Source: analysis of 7th General Census of Agriculture, ISTAT 2020

such as the provinces of Trento and Bolzano, where the percentage of farm managers who have attended training courses exceeds 65% of the total, but in general almost all the northern regions have much higher percentages than the national average value.



# AGRICULTURE, FORESTRY AND FISHING

Production of the agriculture, forestry and fishing sector

Agricultural production

Plant production

Livestock production

Diversification

Fishing

Prices and costs

Income

## PRODUCTION IN THE AGRICULTURE, FORESTRY AND FISHING SECTOR

The year 2023 was a very complex year for the performance of the national primary sector. The production value of the agriculture, forestry and fishery sector grew by 2.0% in current values, coming very close to €77 billion. On the other hand, there was a significant drop in volume (-1.8%), offset by a favourable shift in prices (+3.9%), which although much smaller than the previous year's, is added to a phase of constant price increases. This resulted in a further deterioration of sectoral value added, which fell by a substantial 2.5% in real terms.

The drop in production volumes is particularly worrying when viewed alongside the decline in employment across the entire sector, with a significant decrease in AWU (-2.4%),



### PRODUCTION IN THE PRODUCTION SECTOR

€76,962 MILLION



Agriculture €72,666 million

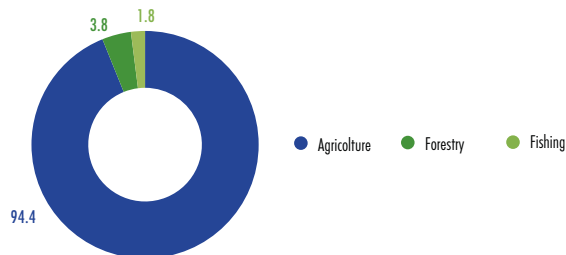


Forestry €2,942 million



Fishing €1,354 million

Value of productions and services at basic prices for the main fields, 2023



Source: ISTAT.

primarily driven by the outflow of self-employed units (-3.5%). Concurrently, the sector's gross fixed capital formation also declined, both in terms of current values (-2.6%) and in volume (-1.5%).

Nonetheless, this sector's overall share of the national economic system remained at 2.2% of GDP at current values.

The sector remains structurally dominated and driven by trends in the agricultural field, which alone accounts for 94.4%. Forestry slightly strengthened its position, with a weight of 3.8% of the total, due to the effect of a slight shrinkage in the volumes produced (-0.9%) and in

the context of a more vigorous price increase than the other two fields (+7.3%). These dynamics translated into a discrete nominal increase in both production and value added (both +6.3%). The already marginal role of fishing was further reduced, with its share in the sector falling below 2%. In this case, the negative trend is due to a new erosion of production volumes (-0.5%), which was not supported by price dynamics, which, on the contrary, fell sharply (-3.7%). This led to a reduction in the current value of output (-4.2%) and an even more pronounced deterioration in the sector's value added (-7.3%).

At the territorial level, the sector's results in volume show a decrease in all geographical areas, with the sole exception of the North-West, which recorded an increase in production (+2.6%) and even more in value added (+6.3%). Looking at the other regions in more detail, the North-East recorded a fall of 2.7% in production and 5.1% in value added; the Centre recorded a drop of 3.8% and 6.1% respectively; the South recorded a similar fall of 3.9% and 4.2%; and finally, the Islands recorded a more limited drop between 1.3% and 1.5%.

## AGRICULTURAL PRODUCTION

The climatic trend of 2023 characterised by a succession of adverse phenomena, sometimes of exceptional magnitude, negatively affected the performance of the Italian agricultural sector, which saw its overall production fall in volume. The climate heavily conditioned above all the results of plant crops, which in the first part of the year suffered from late frosts, below-average temperatures, hail episodes and the presence of humidity, phenomena that in the second half of the year were followed by prolonged summer periods characterised by high temperatures and low rainfall, as well as flooding phenomena during the autumn, which compromised some crops. The dryness of the summer period, however, favoured the good quality of some crops (wine), while also stemming the spread of some pathogens (olive). However, these phenomena alone are not sufficient to justify the overall



**€72,666** MILLION  
IN PRODUCTION AT  
CURRENT VALUES  
**+1.9%**



50.5% agricultural crops



30.5% livestock  
farms



19% services and  
secondary activities

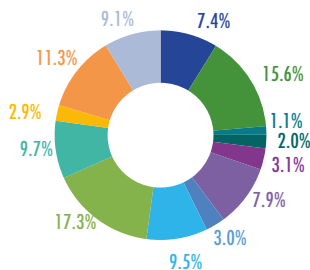


**€37,486** MILLION  
IN VALUE ADDED  
**+7.9%**

performance of the sector, which has seen a fall in the volume of output in almost all its components, including support services, which have shown a negative sign for the second consecutive year after around two decades of trend growth. In particular, the drop in support services seems to confirm the general decline in productive activities in the agricultural sector, which is also reflected in the negative trends in employment and investment. This is all the more the case as the agricultural sector benefitted in 2023 from the mitigation of the effects triggered by the international tensions on the markets for agricultural raw materials and energy products. In

fact, not only did production costs fall by 2.5% after the sharp rise in previous periods, but at the same time the growth in the prices of products sold strengthened (+3.9%), giving a positive signal for the terms of trade. This can be seen in the trend of agricultural value added, which, while falling by 2.5% in volume terms, shows a more than positive change in current values (+7.9%) in the face of a double-digit increase in prices (+10.7%).

**Production of goods and services at basic prices in the agricultural sector - % values at current prices, 2023**



- Cereals and dried pulses
- Vegetables
- Industrial crops
- Floriculture
- Fodder crops
- Wine products
- Olive products
- Fruit and citrus
- Meat
- Milk
- Eggs and other
- Agricultural supporting activities
- Secondary activities

Source: ISTAT.

**Value of production and services at basic prices by main sectors, 2023**

	Current values		% variations 2023/22		
	€ mln	%	of current values	of chain-linked values	implicit prices
<b>PRODUCTION OF AGRICULTURAL GOODS AND SERVICES</b>	<b>67,189</b>	<b>92.5</b>	<b>1.2</b>	<b>-2.7</b>	<b>4.0</b>
- Herbaceous crops	19,308	26.6	-2.9	1.3	-4.2
- Woody crops	2,298	3.2	-4.6	-0.6	-4.0
- Fodder crops	15,106	20.8	-3.1	-11.1	9.0
- Livestock farms	22,130	30.5	6.1	-0.9	7.1
- - Agricultural supporting activities <sup>1</sup>	8,348	11.5	9.1	-1.6	10.8
Secondary activities (+) <sup>1</sup>	6,737	9.3	9.7	7.2	2.4
Secondary activities (-) <sup>2</sup>	1,260	1.7	0.0	0.0	0.0
<b>Agricultural production</b>	<b>72,666</b>	<b>100.0</b>	<b>1.9</b>	<b>-1.9</b>	<b>3.9</b>
<b>Intermediate consumption (including FISIM)</b>	<b>35,180</b>	<b>-</b>	<b>-3.7</b>	<b>-1.3</b>	<b>-2.5</b>
<b>AGRICULTURE VALUE ADDED</b>	<b>37,486</b>	<b>-</b>	<b>7.9</b>	<b>-2.5</b>	<b>10.7</b>

<sup>1</sup> Includes active and passive subcontracting, the packaging of agricultural products, the maintenance of parks and gardens.

<sup>2</sup> Activities carried out in the agricultural sector, such as agritourism, the processing of milk, fruit and meat, etc.

<sup>3</sup> Activities carried out in agriculture by other economic sectors.

Source: ISTAT.

## PLANT PRODUCTION

Plant production, while steadily representing the main component in Italian agriculture, contributed in 2023 just over half of the total value generated by the agricultural sector (50.5%).

During the year, almost all crops suffered a drop in production volumes, as they were compromised by climate-related complications which negatively affected woody crops in particular (-11.1%) and to a much lesser extent fodder crops (-0.6%). Only herbaceous crops bucked the trend, recording an overall increase in volumes of 1.3%, a synthesis of very positive trends for cereals (6.6+%) and industrial crops (+10.2%). Both recorded good yields per hectare, which, however, pushed down price trends, with a final result of a negative sign on current values, particularly acute in the case of cereals (-17.1%). In contrast, pulses, vegetables and the flower sector all



€36,712 MILLION  
IN PRODUCTION  
AT CURRENT VALUES

**-3.1%**



VOLUME  
(CLIMATE STRESS)



recorded slightly lower volumes, which in the case of the last two products were more than offset by price trends.



**+23.3% OLIVE OIL**



**-1.4% FRUIT CROPS**



**+4.7% ORNAMENTAL PLANTS**



**-18.1% WINE**



PRICES  
(SLOWDOWN IN  
THE DYNAMIC)



Among fruit crops, the performance of the wine sector is worthy of note, with a halt in volume production despite a slight drop in prices; this

resulted in a sharp drop in current value (-18.1%). By contrast, olive oil experienced a slight drop in volume (-3%), which was fully offset by a surge in prices, resulting in a double-digit positive change (+23.3%) in current value. A similar trend was observed for citrus, which was less impacted by adverse weather conditions compared to other fruit crops. However, pears, cherries, plums, nectarines and apricots experienced significant damage.

The situation of fodder crops is noteworthy: the fall in volumes, which reached almost 10%, combined with an unprecedented rise in prices (+40.4%), caused serious difficulties for the livestock sector.

### Main plant productions, 2023

	Value <sup>1</sup>	
	thousands of euro	% var. 2023/22
Wine (000 hl)	3,983,091	-18.1
Oil	1,898,328	23.3
Grapes delivered and sold	1,315,933	-14.1
Fodder (hay)	2,297,981	-4.6
Durum wheat	1,833,815	-22.9
Ornamental flowers and plants	1,464,504	0.2
Hybrid maize	1,510,706	-13.2
Tomatoes	1,338,658	1.8
Potatoes	1,042,697	33.6
Apples	1,060,246	-0.9
Lettuce	1,271,864	6.7
Table grapes	556,403	-9.9
Oranges	794,347	21.8
Courgettes	594,911	-2.4
Common wheat	769,129	-19.6
Artichokes	354,593	11.0
Pears	462,044	-13.6

<sup>1</sup> Production at basic prices expressed at current values.

Source: ISTAT

## LIVESTOCK PRODUCTION

In 2023, the livestock sector's overall share of the total national agricultural production at current values rose to 30.5%.

This increase of relative importance, however, was not supported by the good performance of production volumes, which in fact showed a decline in all sectors. The double-digit reduction suffered by honey (-10.9%) stands out, with the sole exception of eggs, which remained stable. The livestock sector's overall performance was driven by a general rise in prices (+7.1%).

Compared to the general trend, the difficulties of the poultry sector stand out, which recorded a modest fall in volume, but was also accompanied by a significant drop in prices, which affected the overall trend in value terms (-7.7%). Among the other meats, the beef sector recorded the largest fall in volume (-2.6%). In terms of prices, however, there



### PRODUCTION VALUE OF LIVESTOCK PRODUCTIONS

**€22,130**

MILLION AT CURRENT VALUES

**+6.1%**



**+5.4%** MEAT



**+5.0%** MILK



**+14.9%** EGGS



**-2.9%** HONEY

are notable increases for pigmeat (+22.4%) and eggs (+14.8%).

Milk production also suffered a further drop in volume (-1.1%), which was more than compensated for by the good trend in prices (+6.1%).

The number of cattle, pigs, sheep and goats is decreasing. Indeed, the restructuring of the sector continues, with the steady decline of small cattle farms in favour of larger ones (500 animals and more) and the steady expansion of organic, free-range and free-range laying hen farms at the expense of cage farms. Sheep farming, with 5.67 million animals, continues its downward trend (-3.4% compared to 2022), as does goat farming, with less than one million animals (-8.2%). On the health front, the outbreaks of African swine fever, which continued to affect several Italian regions in 2023, and the excellent results achieved in the fight against antimicrobial resistance in the poultry sector are worth mentioning.

## Main livestock productions<sup>1</sup>, 2023

	Value <sup>2</sup>	
	thousands of euro	% var. 2023/22
Cow and buffalo milk (000 hl)	6,485,858	4,1
Pigs	4,291,089	22,2
Cattle	3,795,814	4,1
Poultry	3,551,139	-7,7
Eggs (mln units)	2,126,677	14,9
Sheep and goat milk (000 hl)	712,272	13,1
Sheep and goats	193,392	4,7
Honey	33,607	-2,9

<sup>1</sup>Live weight for meat

<sup>2</sup> Production at basic prices expressed at current values.

Fonte: ISTAT

## DIVERSIFICATION

The combined value of agricultural production linked to diversification activities (support and secondary activities) remained significant, accounting for 19% of the value of the production accomplished by operators in the agricultural sector. Of the more than €15 billion produced, just over 55% came from agricultural support activities, and the remaining 45% from secondary activities, with both components showing a positive variation in current values of more than 9% for the year.

The two aggregates, which collectively constitute the diversification activities in agriculture, exhibit a divergence in their production volumes. The former experienced a decline of 1.6% in 2023, while the latter demonstrated a substantial increase of 7.2%. The decline in demand for third-party processing (-7%) affects the entire aggregate of agricultural services. However, it is noteworthy



€15,085 MILLION

THE CURRENT VALUE OF PRODUCTION

+9.1% SUPPORT ACTIVITIES  
+9.7% SECONDARY ACTIVITIES E



+4.2% SUBCONTRACTING



+13.1% PRIMARY PROCESSING



+7.5% RENEWABLE ENERGY



+15.4% AGRITOURISM



+5.3% PROCESSING (FRUIT,  
MILK AND MEAT)



+11.2% DIRECT SALES/  
MARKETING

that the sector experienced an uptick in volumes associated with the primary processing of agricultural products (+3.8%). In terms of secondary activities, it should be noted that the growth in production volume (+7.2%) was supported by almost all the items of the aggregate. In particular, agritourism continued to stabilise its recovery (+4%), renewable energy in agriculture confirmed its steady growth (+7.5%), processing grew in all its declines, but especially in the livestock sectors (+10.7% for milk processing and +8.5% for meat processing), and direct sales and marketing activities continued to strengthen (+9%). Finally, there was strong growth in park and garden landscaping (+20%).

Subcontracting, despite the reduction in the area cultivated, remains the dominant sector in terms of economic importance, followed by energy production and, not far behind, primary processing. These first three

## Production of supporting and secondary activities in the Agricultural sector, 2023

	Current values (€ mln)	% var. current values 2023/22	% var. chain-linked values (2015) 2023/22	Weight %
Processing seeds for sowing	356	+22.0	+7.0	4.3
New crops and plantations	241	+6.7	-3.0	2.9
Agricultural activities on behalf of third parties (subcontracting)	4,052	+4.2	-7.0	48.5
Primary processing of agricultural products	2,376	+13.1	+3.8	28.5
Land maintenance to keep it in good agricultural and ecological conditions	783	+26.5	+10.0	9.4
Supporting activities for livestock farming	297	+4.0	-1.0	3.6
Other supporting activities	243	+1.5	+0.5	2.9
<b>SUPPORTING ACTIVITIES TOTAL</b>	<b>8,348</b>	<b>+9.1</b>	<b>-1.6</b>	<b>100.0</b>
Aquaculture	10	-7.9	-6.0	0.1
Processing of plant products (fruit)	211	-6.1	+6.6	3.1
Milk processing	447	+9.4	+10.7	6.6
Agritourism, including recreational and social activities, educational farms	1,872	+15.4	+4.0	27.8
Processing of animal products (meat)	445	+7.4	+8.5	6.6
Renewable energy (photovoltaic, biogas, biomass)	2,594	+7.5	+7.5	38.5
Craft (woodwork)	88	+6.0	+5.0	1.3
Animal feed production	239	-1.9	-1.3	3.5
Park and garden landscaping	408	+20.0	+20.0	6.1
Direct sales/marketing	422	+11.2	+9.0	6.3
<b>SECONDARY ACTIVITIES TOTAL*</b>	<b>6,737</b>	<b>+9.7</b>	<b>+7.2</b>	<b>100.0</b>

\* Activities carried out in agriculture by other production sectors are not included (secondary activities entered as a negative).

Source: ISTAT, Economic Accounts for Agriculture

positions, together with agrotourism, explain more than 72% of the value of diversification in Italian agriculture.

## FISHING

### The fishing fleet

In 2023, the Italian fleet further shrank from its 2022 size (-1%), continuing the negative trend which has been going on for 20 years. This trend has been observed in many other EU countries, which is why Italy continues to have the largest fleet in Europe.

Analysing how ship use is distributed across different fishing systems, the importance of small-scale fishing emerges once again, accounting for 68.9% of the total, followed by bottom trawling, which accounts for 16.9% of the Italian fleet.

### Catches and production value by fishing systems

In 2023, the quantity of landings in Italy reached 120.7 tonnes, a reduction of 9.7% from 2022. The economic value of production also decreased (-8.7%), confirming the



**SHIP FLEET**  
**11,689** (NUMBER)



**QUANTITY OF LANDINGS**  
**120.73** (TONNES)



**ECONOMIC VALUE**  
**698.54** (MILLIONS DI EURO)

crisis in the Italian fishing sector. The most profitable fishing systems remain bottom trawling, which by itself is responsible for 41.4% of all revenues from fishing, and small-scale fishing, representing 22.4% of the total.

In terms of landings, bottom trawling continues to rank first, accounting for 30% of the total. This is followed by midwater trawling, which

accounts for 16% of the total catches, and then by small-scale fishing, purse seine fishing and hydraulic dredges, all with a percentage share around 15% of the total landings.

### Geographic distribution of catches

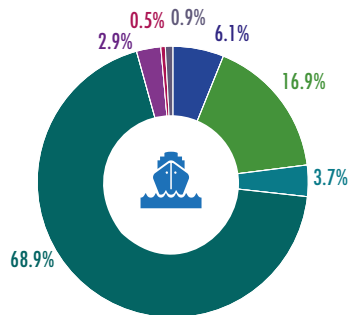
Sicily alone is responsible for 17% of all Italian fishing, followed by Marche, where clam fishing plays a very important role for the country, as well as Veneto, which is the third region in terms of quantity of landings.

In terms of production value, the mentioned regions also take the top positions. The result of Apulia also stands out, where the value of the catches accounts for 12% of the country's revenue.

### Main species caught and their economic value

Of the 200 or so species fished in Italy, ten alone account for 61% of

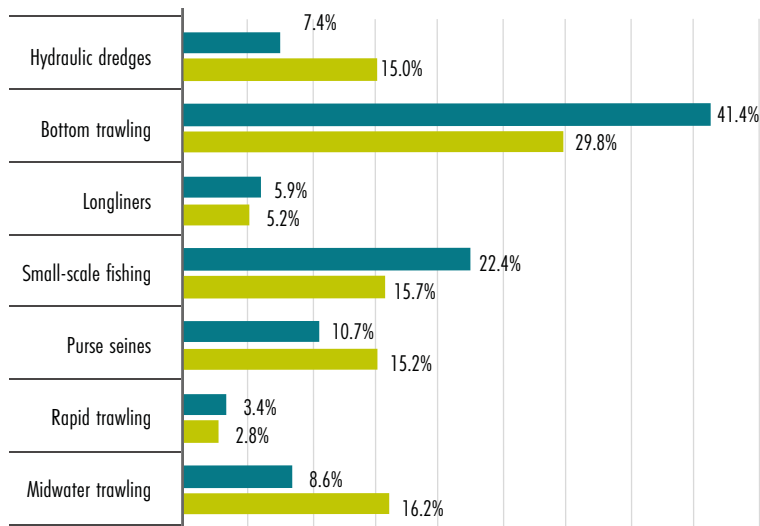
## Fleet by fishing system (2023)



Hydraulic dredges	713
Bottom trawling	1,976
Longliners	437
Small-scale fishing	8,059
Purse seines	340
Rapid trawling	62
Midwater trawling	102

Source: CREA analysis of fisheries data

## Catches and production value by fishing system, 2023

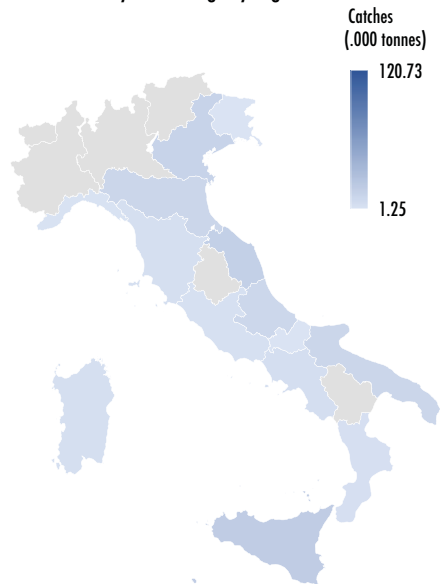


● Economic value  
● Total landings

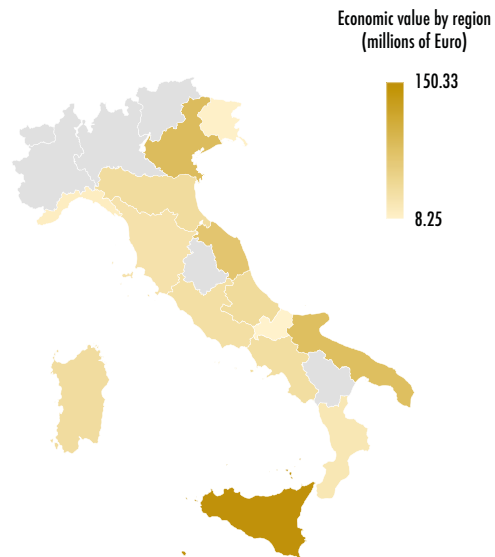
**Total landings 120.73 tonnes**  
**Economic value 698.54 millions of euro**

## Geographic distribution of catches and production value, 2023

### Quantity of landings by region



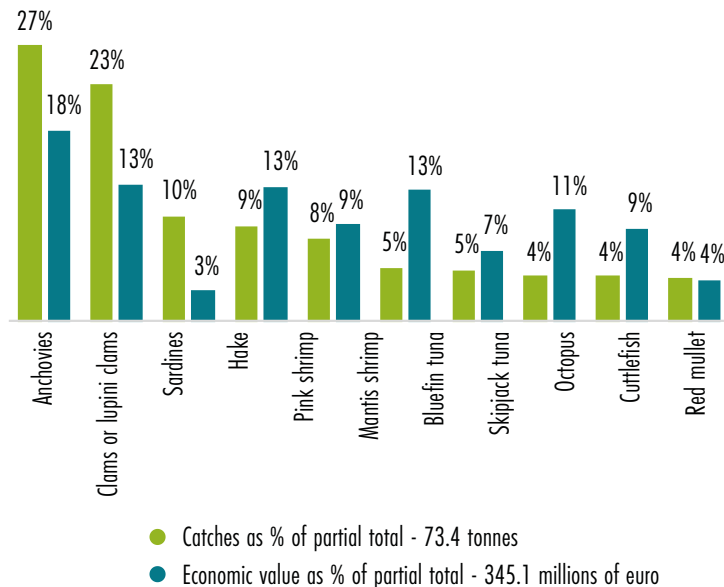
### Economic value by region



Source: CREA analysis of fisheries data

the entire catches and half of fishing revenues. Data on the make-up of catches in 2023 confirm anchovies as the main target species, followed by clams and sardines. These three species alone account for 36% of the entire Italian catches, with an economic value of €119 million. Anchovies are also the leading species in terms of overall revenue, representing 27% of the value of partial production (considering just the top ten target species). The economic value of hake and tuna is also worth mentioning, accounting for 13% of revenue, and cuttlefish for 11%.

Catches and production value by the top 10 species caught in Italy



Source: CREA analysis of fisheries data

## PRICES AND COSTS

In 2023, the average year-on-year increase in the prices of agricultural products was 3.9%, a marked slowdown compared to the previous year (+17.5%) which shows that the expansive effect on prices triggered by the consequences of the Russian-Ukrainian conflict on the global markets of raw materials is being reabsorbed.

The prices of crop products increased on average by 0.8% (+17.1% in 2022). The strongest increases were observed for woody crops, especially olive oil (+27.2%), citrus (+21.4%) and fruit (+11.1%); in contrast, significant decreases were observed for cereals (-22.2%), industrial crops (-10.7%) and fodder (-4.0%).

The prices of livestock products recorded a substantial increase (+7.1%), albeit a marked decrease compared to 2022 (+24.3%). Significant increases were seen for meat,

PRICES OF PRODUCTS SOLD  
**+3%**



Prices of  
plant products  
**0.8%**



Prices of animals  
and animal products  
**+7%**

PRICES OF THE CAPITAL GOODS  
PURCHASED  
**+6%**

PRICES OF THE INTERMEDIATE  
GOODS PURCHASED **-3%**



Prices of  
fertilisers  
**-18%**



Prices of  
animal feed  
**-6%**



Prices of energy  
and lubricants  
**-7%**

especially pigmeat (+22.4%), while there was a decrease in the price of poultry meat (-7.4%).

Increases were also observed for the prices of service activities (+10.8%) and secondary activities (+2.4%).

In terms of costs incurred by farmers, the average price of goods and services used in agriculture de-

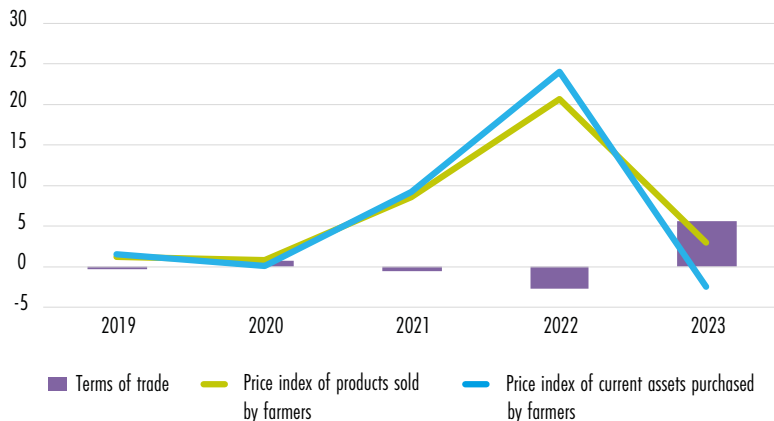
creased by 2.5% in 2023, following the strong growth in 2022 (+30.6%). Prices decreased significantly especially for fertilisers (-18.4%), energy products (-8.4%) and animal food (-5.9%).

The agricultural sector's terms of trade increased by 6% compared to 2022.

Over the last five years (2019-2023), producer prices have risen by 36%,

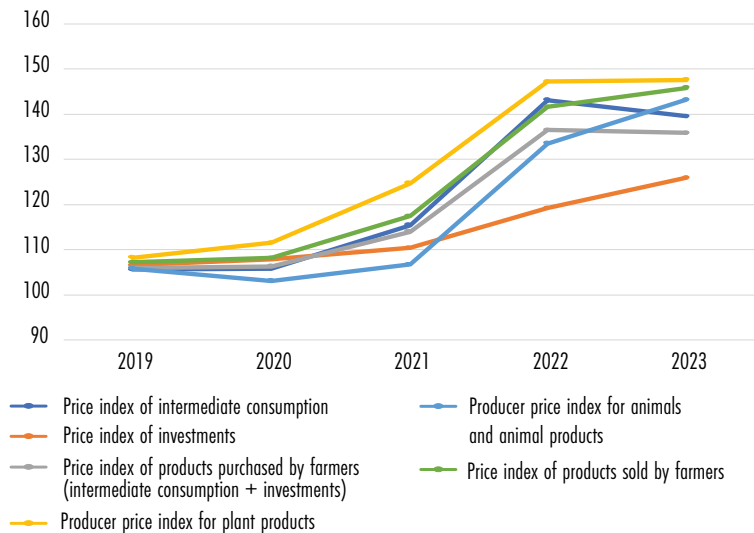
more than the increase in the prices of current assets (+32%), resulting in a 3% increase in the terms of trade. If production inputs also include capital goods, whose prices rose by 18%, the ratio of sale and purchase prices is even higher (+6%). The increase in producer prices is due to bullish trends involving both the plant (+36%) and animal (+35%) products. The former is driven, in particular, by wheat and fodder crops (+54%), while the latter by porkmeat (+49%). As far as intermediate goods are concerned, the increase in prices is mainly attributable to the dynamics affecting expenditure on fertilisers (+58%) and energy (+49%).

Annual variation in price indices and terms of trade



Source: ISTAT

## Price index of products purchased and sold by farmers – index numbers (2015=100)



Fonte: ISTAT

## INCOME

Eurostat estimates of the “agricultural income per annual work unit” at factor cost give a value of €122 for Italy. This figure is lower than the European average (€136), but higher than our direct agricultural competitors such as France (€114) and Spain (€110).

Income from employed work in the agriculture, forestry and fishing sector amounts to around €10 billion and represents only 1.2% of the estimated total income from employed work in our country of around €824 billion (ISTAT).

The agricultural sector is also the one with the lowest growth, only +0.8% compared to 5.2% of the total economy. However, the last five years have seen an upward trend: from 2019 to 2023, income from employed work increased by 12%.

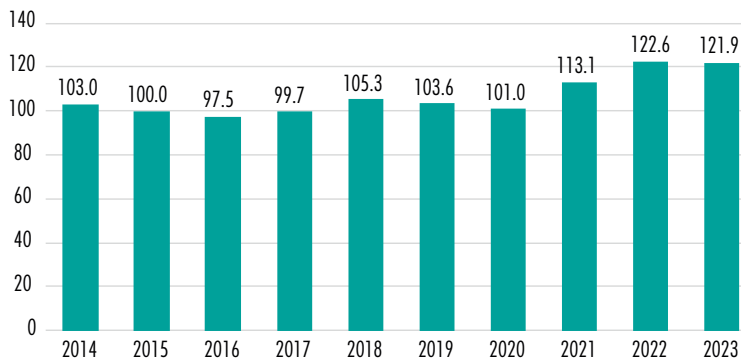


### AGRICULTURAL INCOME PER WORK UNIT

(EUROSTAT INDICATOR)

**€122 (-0.6%)**

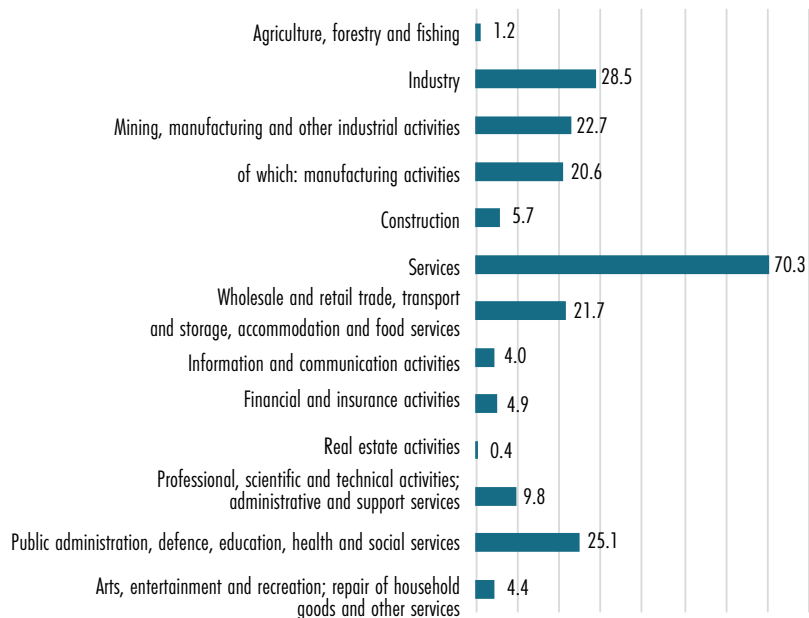
Index of real agricultural income per annual work unit



Source: analysis of Eurostat data, 2024

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## Percentage proportion of income from employed work by economic activity



Source: analysis of National economic accounts, ISTAT 2023

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# PRODUCTION FACTORS

Intermediate consumption

Work and employment

Investments

Credit

## INTERMEDIATE CONSUMPTION

In 2023, intermediate consumption at current value in the agricultural sector reversed the upward trend and fell by 4%. Growth was held back by the return of prices to pre-pandemic levels (-2%), accompanied by a reduction in volumes (-1%). Analysis of the individual cost items reveals generalised decreases, particularly in fertiliser and energy costs. Seeds and plant protection products bucked the trend. For the latter, the growth was also due to an increase in quantities purchased. The distribution of intermediate consumption shows a consolidation of the component related to other goods and services, which gained two percentage points compared to 2022, against a weakening of the energy segment, which lost more than two percentage points. Different dynamics can be observed in the forestry and fishing sectors. In the former, prices continue to



### AGRICULTURE

€35 billion



FERTILISERS

-20%



ENERGY

-12%



INTRA-UNIT CONSUMPTION -5%



FEED

-6%



FORESTRY

€552 million



FISHING AND  
AQUACULTURE

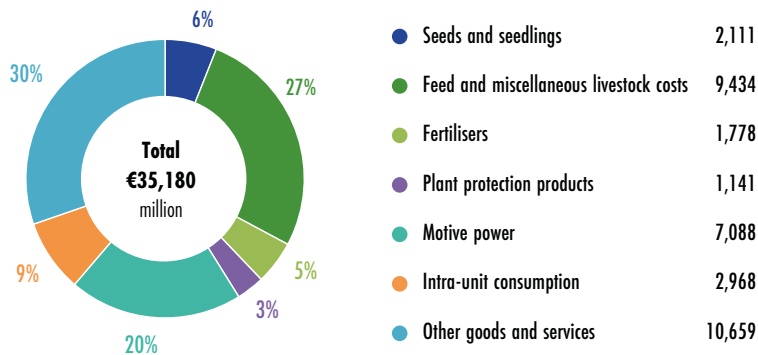
€774 million



INTERMEDIATE COSTS  
AS PROPORTION OF  
AGRICULTURAL  
PRODUCTION

47%

### Breakdown of intermediate consumption in agriculture (% of total), 2023



Source: ISTAT

rise, by a further 6%, while volumes remain more or less unchanged. On the other hand, the situation in the fishing sector is reversed, with a fall in prices (-4%) and an increase in quantities consumed (+2%).

## WORK AND EMPLOYMENT

In 2023, for the second consecutive year, the total number of agricultural employees decreased in all the regions, mainly as a result of the sharp falls recorded in northern Italy. The South continues to absorb the highest percentage of employees in our country (49.6%), followed, but at a greater distance, by the North-East (19.3%). The negative trend is confirmed by the fall in the total number of work units recorded in the ISTAT national accounts (-2.8%).

Over the last year, the number of employees has fallen significantly (-4.6%), although in absolute terms they still outnumber the self-employed. Female employment experienced a more negative variation (-4.3%) than male employment (-2.7%), which brings it to just under 26% of the total.

The age group that seems to bear the brunt of this negative trend is that of



**TOTAL WORK UNITS  
IN AGRICULTURE**

**1,109,000**



**AGRICULTURAL EMPLOYEES BY  
AGE BRACKET:**

**15-34 YEARS**

172,000 PEOPLE (-6.3%)

**35-89 YEARS**

676,000 PEOPLE (-2.3%)



**AGRICULTURAL EMPLOYEES  
BY SEX:**

**MALE**

629,000 (-2.7%)

**FEMALE**

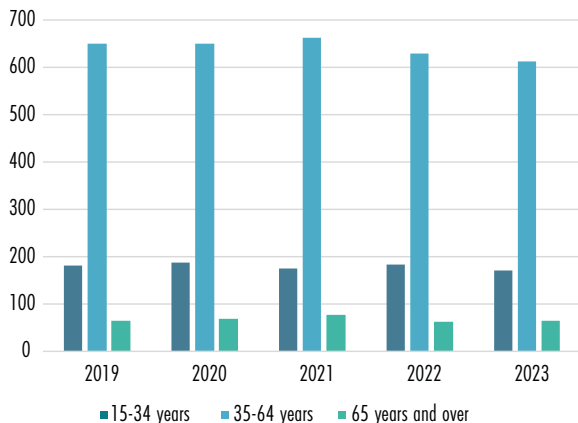
218,000 (-4.3%)

### Employment trend in agriculture, forestry and fishing (000)

	2019	2020	2021	2022	2023
Employees	473	490	490	484	462
Self-employed	423	415	424	391	386
<b>Total</b>	<b>896</b>	<b>905</b>	<b>913</b>	<b>875</b>	<b>848</b>

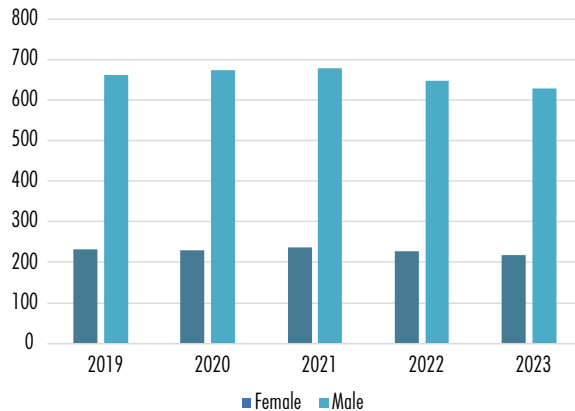
Source: ISTAT, Workforce analysis

### Employees by age bracket in agriculture, forestry and fishing (000)



Source: ISTAT, Workforce analysis

### Employees by sex in agriculture, forestry and fishing (000)



Source: ISTAT, Workforce analysis

young people aged between 15 and 34 (-6.3%), who account for around 20% of the total number of agricultural employees.

There was also a slight decline in the number of employees with foreign citizenship (-1.5%), who make up 18% of the total employees.

## INVESTMENTS

In 2023, gross fixed capital formation in agriculture, amounting to €10,742 million at current values and €9,490 million at constant values (chain-linked, base year 2020), is almost unchanged compared to 2022, growing by 0.5% and 0.3% respectively. Trends in recent years show significant growth since 2016, with the sole exception of the year 2020 (-11.1%), due to the pandemic crisis.

The share of total investments attributable to agriculture, in the amount of almost 2% in 2022, shows a steady decline from 2017 to 2023, highlighting a reduction in agriculture's propensity to invest compared to the rest of the economy. On the contrary, the ratio between the value of agricultural investments and the value added in the sector, both expressed at constant values, shows a fluctuating dynamic over the period analysed: after the reduction in 2022, it returns to grow in



GROSS FIXED CAPITAL  
FORMATION FOR AGRICUL-  
TURE, FORESTRY AND FISHING

**€10,742** MILLION



Agricultural  
investments as  
proportion of total **2%**



Investments as proportion  
of agricultural value  
added **29.8%**

2023, reaching 29.8%. Investments expressed in work units amounted to €8,554 in 2023, again representing an increase over the previous year (+2.8%) and a brighter picture than the rest of the main national economic sectors, for which



MANUFACTURING  
INDUSTRY

**€80,663** MILLION



Investments per work  
unit **€8,554**



Net capital stock per  
work unit **€119,702**

the ratio fell in the year analysed (-1.3 Manufacturing industry, -1.8% Construction and -2.8% Services). In absolute terms, this is equivalent to a little less than half the value reported for the same ratio for the economy as a whole (€17,586).

## Gross fixed capital formation and capital stock trends for agriculture, forestry and fishing

Years	Investments (current values)	% variation from previous year	Investments (constant values *)	Capital stock** (constant values *)	% investments over***	
	€ mln	%	€ mln	€ mln	tot. inv. economy	agricultural VA
2017	8,979	16.0	8,835	152,114	2.9	26.9
2018	10,113	12.6	9,775	150,389	3.2	29.2
2019	10,429	3.1	9,907	148,985	3.2	30.1
2020	9,309	-10.7	8,881	146,741	3.1	28.2
2021	10,694	14.9	9,777	145,390	2.8	31.4
2022	12,377	15.7	11,048	145,186	2.9	36.2
2023	10,742	0.5	9,490	132,797	2.0	29.8

\* Chain-linked values, base year 2020.

Source: analysis of ISTAT data.

\*\* Stock of non-financial assets, net of depreciation

\*\*\* Proportion at chain-linked values, base year 2020; agricultural VA at base prices.

The ratio between value added and capital stock (net of depreciation) shows that the agricultural sector produces €0.20 of value added for every euro of capital invested in 2023. The same ratio<sup>1</sup> is 0.6 for the manufacturing industry, 1.6 for the construction sector, 0.3% for the services sector.

<sup>1</sup> It can be seen as a sort of return on capital invested, indicating the overall efficiency with which businesses in the sector use capital for the generation of value.

## Gross fixed capital formation: characteristic ratios for the main sectors, 2023\*

	Investments over Value Added (%)	Investments over work units (euro)	Capital stock over work units (euro)	Value Added over Capital Stock <sup>2</sup> (euro)
Agriculture, forestry and fishing	29.8	8,554	119,702	0.2
Manufacturing industry	26.1	21,290	134,986	0.6
Construction	11.6	6,773	37,495	1.6
Services <sup>1</sup>	24.4	17,400	282,535	0.3
TOTAL ECONOMIC ACTIVITIES	25.0	17,586	247,889	0.3

\* Chain-linked values, base year 2020

<sup>1</sup> Gross of housing investments.

<sup>2</sup> Stock net of depreciation.

Source: analysis of ISTAT data.

## CREDIT

In 2023, the size of the loans granted by banks to the agricultural sector fell compared to the previous year (-2.5%), going from €40,442 to €39.421 million.

The distribution of agricultural credit throughout the nation structurally favours the regions of Northern Italy, with around 63% of national loans. However, the economic situation in 2023 is particularly disadvantageous for the northern regions, with negative variations of 4.7% for the North-West and 3.1% for the North-East.

Significant shrinkage of 8.8% can be seen in terms of medium- and long-term loans, confirming the negative trend of recent years (the cumulative reduction from 2016 is around 29%). The reduction in 2023 especially concerned financing for the construction of rural buildings (-12.6%). More modest but still significant decreases also affected loans for the purchase of rural real estate and of machinery and

### MEDIUM- AND LONG-TERM LOANS FOR AGRICULTURE

Total **€8,479** MILLION



Purchases of machinery and equipment  
**€3,742** million



Construction of rural buildings  
**€2,173** million



Purchase of rural real estate  
**€2,565** million

equipment (-7.1 and -7.6% respectively).

The northern regions received the largest share of medium- and long-

### BANK LOANS GRANTED IN 2023



Agriculture, forestry and fishing **€39,421** MILLION

Food and drink industry **€33,507** MILLION

### LOANS GRANTED FOR AGRICULTURE BY ZONE



North-East Italy  
**27.5%**

North-West Italy  
**35.6%**

Central Italy  
**17.6%**

Southern Italy  
**12.9%**

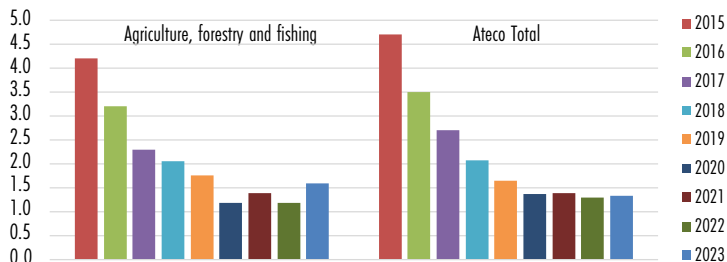
Italian Islands  
**6.4%**

term financing (61% of the national amounts), but the negative economic situation in 2023 mainly penalised the regions belonging to this area

(-8% in the North-West, -10% in the North-East).

The quality of credit also deteriorated by almost half a point in 2023: the impairment rate (the number of new loans entering non-performing status as a proportion of the stock loans existing at the start of the period) rose to 1.6% in 2023 (it was 1.2% in 2022).

### Annual loan impairment rate - adjusted default: used



Source: analysis of Banca d'Italia data

### Bank loans to agriculture, forestry and fishing, December 2023

	Agriculture (€ mln)	% variation from previous year	% of total agricultural loans	% of total loans in the production areas
North-West	10,837	-4.7	27.5	4.1
North-East	14,042	-3.1	35.6	7.6
Centre	6,928	0.1	17.6	5.0
South	5,101	-1.2	12.9	7.0
Islands	2,513	0.4	6.4	9.2
Total	39,421	-2.5	100.0	5.7

Source: analysis of Banca d'Italia data

### Medium and long-term loans<sup>1</sup> to agriculture, December 2023

	Italy (€ mln)	2022/2023 (%)
Machinery and equipment	3,742	-7.6
Construction of rural buildings	2,173	-12.6
Purchase of rural real estate	2,565	-7.1
Total	8,479	-8.8
North-West	2,463	-8.0
North-East	2,696	-10.1
Centre	1,419	-8.6
South	1,309	-8.3
Islands	593	-6.9

<sup>1</sup> Excluding non-performing loans data

Source: analysis of Banca d'Italia data



# ECONOMIC RESULTS FOR FARMING BUSINESSES

Production and income

Plant production trends

Livestock production trends

Comparison with EU countries

## PRODUCTION AND INCOME

In 2022, FADN farms reported total farm revenues averaging €94,573 and €51,890 of value added. The net farm income, representing the share of revenues that remains available to the farm manager and family once explicit farm costs have been subtracted, is €34,171, equivalent to 36% of farm revenues.

Higher economic results were recorded in the northern regions, as a consequence of the greater presence of intensive farms and industrial-type livestock enterprises. Specifically, Lombardy takes first place in this classification with a value added more than double the national average. On the other hand, the regions of Central-Southern Italy, where more extensive farming practices are typical, come in below the national average.



### VALUE ADDED

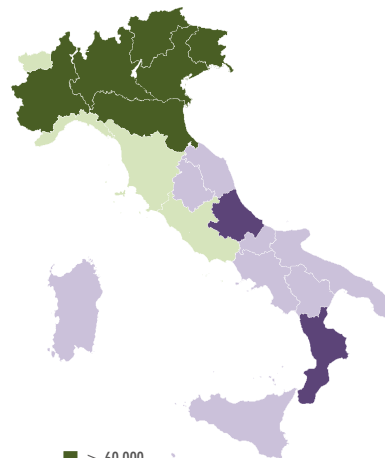


Cereals	42,175
Horticulture	99,373
Fruits	41,665
Wine	45,384
Olives	23,732

Dairy cattle	138,141
Sheep and goats	51,313
Mixed cattle	41,829
Granivores	135,869
Mixed livestock	44,105



### Value added by regions, 2022



Source: analysis of FADN data

## Structural data and main economic results by region, farm averages 2022

Region	UAA ha	LU n.	WU n.	FWU n.	Farm Revenues €	Current Costs €	Multi-year Costs €	Distributed Income €	Net Income €
Abruzzo	21.2	9.7	1.4	1.1	65,210	26,146	5,775	11,272	24,434
South Tyrol	13.4	7.7	2.0	1.4	122,110	39,307	16,454	20,429	46,136
Basilicata	27.5	7.8	1.5	1.1	60,808	26,730	5,533	10,328	21,954
Calabria	10.2	2.8	1.4	0.9	33,788	10,399	3,081	9,742	12,501
Campania	11.0	10.7	1.5	1.0	65,940	29,454	3,928	10,136	23,502
Emilia-Romagna	20.3	24.0	1.8	1.2	146,487	68,111	6,963	19,912	52,266
Friuli Venezia Giulia	22.2	17.6	1.6	1.3	126,695	57,822	10,935	14,141	49,318
Lazio	22.5	11.2	1.6	1.0	92,558	38,800	8,438	16,906	32,550
Liguria	9.7	3.1	1.6	1.1	99,076	27,997	6,161	13,222	53,937
Lombardy	34.7	79.1	1.7	1.4	258,953	144,192	10,377	23,838	76,133
Marche	21.0	6.3	1.1	1.0	55,862	24,050	3,765	6,404	23,540
Molise	20.6	11.1	1.2	1.1	54,734	23,388	4,644	6,439	22,539
Piedmont	27.5	36.2	1.7	1.4	146,655	71,610	8,252	15,047	55,555
Apulia	15.0	3.4	1.3	0.8	61,394	26,058	4,976	11,126	19,385
Sardinia	46.5	22.8	1.3	1.1	75,398	29,839	5,162	8,812	36,804
Sicity	18.0	6.3	1.2	0.7	49,517	18,966	3,560	9,924	17,190
Tuscany	25.4	6.6	1.8	1.3	115,741	46,076	8,700	18,389	47,002
Trentino	12.9	13.4	1.5	1.1	96,467	38,323	11,367	13,694	40,872
Umbria	22.1	14.6	1.1	0.9	73,505	37,526	5,753	10,831	24,154
Aosta Valley	43.5	21.2	1.9	1.6	72,006	31,257	10,321	12,152	35,406
Veneto	16.6	24.0	1.5	1.2	134,237	64,247	9,704	15,799	50,233
<b>Italy</b>	<b>20.7</b>	<b>16.5</b>	<b>1.5</b>	<b>1.1</b>	<b>94,573</b>	<b>42,684</b>	<b>6,432</b>	<b>13,345</b>	<b>34,171</b>

Source: analysis of FADN data

## Structural and economic indicators by region, 2022

	REVENUE/ha	REVENUE/LU	REVENUE/WU	NR/FWU	NR/REVENUE (%)	NR/ha	NR/LU
Abruzzo	3,075	6,724	46,913	21,527	37	1,152	2,519
South Tyrol	9,111	15,830	59,861	33,588	38	3,442	5,981
Basilicata	2,214	7,800	39,526	20,729	36	800	2,816
Calabria	3,311	11,981	24,420	13,205	37	1,225	4,433
Campania	5,982	6,148	44,496	24,355	36	2,132	2,191
Emilia-Romagna	7,207	6,096	83,619	42,671	36	2,571	2,175
Friuli Venezia Giulia	5,695	7,180	80,730	39,184	39	2,217	2,795
Lazio	4,116	8,258	56,347	31,725	35	1,448	2,904
Liguria	10,236	31,562	61,414	50,881	54	5,572	17,182
Lombardy	7,461	3,272	149,811	55,233	29	2,194	962
Marche	2,655	8,883	52,110	23,358	42	1,119	3,743
Molise	2,663	4,953	45,100	21,178	41	1,097	2,040
Piedmont	5,339	4,051	87,447	38,804	38	2,022	1,535
Apulia	4,095	18,278	48,259	25,305	32	1,293	5,771
Sardinia	1,622	3,305	58,497	33,861	49	792	1,613
Sicily	2,757	7,895	42,486	23,734	35	957	2,741
Tuscany	4,563	17,497	62,990	35,026	41	1,853	7,105
Trentino	7,457	7,180	65,100	35,847	42	3,160	3,042
Umbria	3,322	5,035	64,277	25,997	33	1,092	1,654
Aosta Valley	1,655	3,391	37,054	22,187	49	814	1,668
Veneto	8,062	5,582	90,736	43,032	37	3,017	2,089
<b>Italy</b>	<b>4,573</b>	<b>5,744</b>	<b>64,777</b>	<b>32,514</b>	<b>36</b>	<b>1,652</b>	<b>2,075</b>

Source: analysis of FADN data

## PLANT PRODUCTION TRENDS

Among the leading plant species, farms specialising in cereal crops stand out for their larger surface areas but these are not matched by high economic results.

On the other hand, farms specialising in horticulture – characterised

by small land surface areas, but high labour intensiveness – record the best production and income results. The economic results produced by the fruit and wine sectors were similar, and the most efficient in terms of income as a proportion

of total farm revenue. Performances were lowest in the olive sector, with family labour profitability just over €18,000.

## LIVESTOCK PRODUCTION TRENDS

Among livestock sectors, farms specialising in granivores, characterised by large (340 LU per farm on average) and intensive (15 LU/ha on average) livestock farms, stand out for the high production and income values obtained. Very good performances are also recorded

in the dairy cattle sector, although lower than in the granivorous sector. Considerably more modest economic results were returned by farms specialising in mixed cattle (milk and meat), which are generally more extensive in nature (1.2 LU/ha), and by farms specialising in

sheep and goats, also mainly extensive (0.7 LU/ha). However, sheep and goat farms turned out to be the most efficient in terms of their capacity to transform almost half of their revenue into profit.

## Structural data and main economic results by type of farming (TF), farm averages 2022

	UAA ha	LU n.	WU n.	FWU n.	Farm Revenues €	Current Costs €	Multi-year Costs €	Distributed Income €	Net Income €	
Plants	Cereals	32.0		1.0	0.9	78,913	36,738	4,814	8,338	28,499
	Horticulture	4.9		3.0	1.4	173,104	73,731	6,608	36,172	53,817
	Fruits	8.1		1.4	0.9	63,884	22,219	5,529	12,755	24,706
	Wine	9.3		1.3	0.9	69,260	23,876	5,782	10,960	31,479
	Olives	11.6		1.1	0.8	35,354	11,623	3,536	8,704	14,731
Livestock	Dairy cattle	37.4	92.0	2.2	1.6	287,695	149,554	17,296	26,720	99,378
	Sheep and goats	51.9	38.4	1.5	1.3	83,601	32,288	6,898	9,600	40,818
	Mixed cattle	42.4	50.6	1.4	1.2	114,371	72,542	7,623	10,843	26,374
	Granivores	22.6	343.1	2.3	1.6	385,887	250,017	12,845	29,106	94,741
	Mixed livestock	28.4	33.0	1.4	1.1	97,104	52,999	6,712	12,880	31,213
		1.1								
Mixed: crops and livestock	27.8	21.2	1.5	1.3	97,859	47,472	7,163	10,291	36,812	

Source: analysis of FADN data

## Structural and economic indicators by TF, 2022

	REVENUE/ ha	REVENUE/ LU	REVENUE/ WU	NR/FWU	NR/REVENUE (%)	NR/ha	NR/LU	
Plants	Cereals	2,468		78,270	30,104	36	891	
	Horticulture	35,369		57,012	39,855	31	10,996	
	Fruits	7,845		44,147	26,133	39	3,034	
	Wine	7,420		55,246	34,565	45	3,372	
	Olives	3,045		30,873	18,531	42	1,269	
Livestock	Dairy cattle	7,694	3,126	128,852	61,035	35	2,658	1,080
	Sheep and goats	1,611	2,179	56,140	32,038	49	787	1,064
	Mixed cattle	2,696	2,259	82,844	22,036	23	622	521
	Granivores	17,050	1,125	165,808	60,006	25	4,186	276
	Mixed livestock	3,419	2,944	69,689	27,243	32	1,099	946
Mixed: crops and livestock	3,525	4,623	65,221	28,412	38	1,326	1,739	

Source: analysis of FADN data

## COMPARISON WITH EU COUNTRIES

This section compares, for each production sector, the economic results of production factors recorded over the last three years (FADN 2020-2021-2022) by farms in the EU countries with the most advanced agriculture, bearing in mind the great differences that exist in terms of

production factors and agri-environment-climate contexts.

In the livestock sector, our country shows excellent economic results, in line with the countries with livestock specialisation. In particular, when it comes to the profitability of family labour, Italy ranks first in the mixed

cattle sector, second in the dairy cattle and sheep and goat sectors, and third in the granivore sector after Denmark and Spain.

In the plant sector, the performance of our agriculture is determined by its modest structure - in terms of UAA and work units - which reduces its

### Farms specialising in cereal crops: average farm results in euro (three-year period 2020-2022)

	GP/ha	GP/WU	NR/ha	NR/FWU
Denmark	1,962	237,743	422	80,001
France	1,302	129,495	350	38,331
Germany	1,411	138,193	241	36,636
Ireland	1,841	185,330	862	105,822
<b>Italy</b>	<b>1,576</b>	<b>54,554</b>	<b>868</b>	<b>31,991</b>
Poland	1,082	24,842	471	11,653
Portugal	1,075	24,595	657	16,851
Romania	799	42,917	369	36,413
Spain	740	55,676	363	30,930

Source: analysis of FADN data

### Farms specialising in horticulture: average farm results in euro (three-year period 2020-2022)

	GP/ha	GP/WU	NR/ha	NR/FWU
Denmark	23,481	135,001	1,869	134,795
France	26,978	76,464	5,089	44,975
Germany	66,941	104,766	9,652	71,568
Greece	21,255	23,402	5,933	12,954
<b>Italy</b>	<b>30,505</b>	<b>60,808</b>	<b>11,101</b>	<b>39,372</b>
Netherlands	90,674	168,410	18,084	180,732
Poland	9,836	20,752	3,158	10,467
Portugal	10,949	23,188	3,538	12,682
Romania	7,089	8,055	2,478	3,456
Spain	27,017	45,927	9,200	57,361

Source: analysis of FADN data

ability to compete at EU level. Nonetheless, in terms of land factor pro-

ductivity Italy ranks first in the cereal crop, fruit-growing, viticulture and

olive sectors, and second in horticulture, after the Netherlands.

### Farms specialising in fruit-growing: average farm results in euro (three-year period 2020-2022)

	GP/ha	GP/WU	NR/ha	NR/FWU
France	7,699	62,479	1,911	46,107
Germany	14,496	68,980	2,473	42,402
Greece	5,076	24,682	2,492	17,052
<b>Italy</b>	<b>6,433</b>	<b>42,767</b>	<b>3,228</b>	<b>32,659</b>
Poland	2,961	12,658	1,248	6,737
Portugal	3,849	23,714	2,024	22,161
Romania	3,689	13,303	2,006	10,966
Spain	4,064	42,158	1,919	48,454

Source: analysis of FADN data

### Farms specialising in olive-growing: average farm results in euro (three-year period 2020-2022)

	GP/ha	GP/WU	NR/ha	NR/FWU
Greece	2,505	15,638	1,273	9,582
<b>Italy</b>	<b>2,349</b>	<b>25,029</b>	<b>1,550</b>	<b>22,618</b>
Portugal	364	11,457	321	11,940
Spain	1,857	35,479	1,044	32,564

Source: analysis of FADN data

### Farms specialising in viticulture: average farm results in euro (three-year period 2020-2022)

	GP/ha	GP/WU	NR/ha	NR/FWU
France	9,248	92,240	2,211	46,175
Germany	11,581	71,470	4,122	40,133
Greece	3,996	20,899	1,873	12,351
<b>Italy</b>	<b>7,642</b>	<b>56,717</b>	<b>4,431</b>	<b>43,732</b>
Portugal	4,435	27,725	2,212	20,672
Romania	3,248	19,271	1,259	22,597
Spain	2,106	32,821	1,029	26,770

Source: analysis of FADN data

### Farms specialising in dairy cattle: average farm results in euro (three-year period 2020-2022)

	GP/ha	GP/LU	GP/WU	NR/ha	NR/LU	NR/FWU
Denmark	6,719	3,692	316,578	877	482	138,057
France	2,585	2,277	133,236	485	427	31,056
Germany	3,955	2,862	154,062	705	510	42,886
Ireland	3,874	1,805	150,180	1,325	617	61,235
<b>Italy</b>	<b>7,311</b>	<b>2,841</b>	<b>136,564</b>	<b>2,929</b>	<b>1,138</b>	<b>72,200</b>
Netherlands	7,322	3,193	226,539	1,098	479	39,553
Poland	2,394	1,853	33,182	1,009	781	14,629
Romania	1,919	1,893	15,129	692	683	6,610
Spain	7,964	2,653	136,594	2,289	763	62,497

Source: analysis of FADN data

### Farms specialising in granivores: average farm results in euro (three-year period 2020-2022)

	GP/ha	GP/LU	GP/WU	NR/ha	NR/LU	NR/FWU
Denmark	9,906	1,620	378,657	1,322	216	228,617
France	9,108	1,123	237,484	813	100	31,687
Germany	6,206	1,638	240,478	482	127	29,236
<b>Italy</b>	<b>14,492</b>	<b>895</b>	<b>158,497</b>	<b>5,491</b>	<b>339</b>	<b>82,961</b>
Netherlands	91,759	1,276	473,611	6,047	84	50,497
Poland	10,366	1,830	134,430	1,830	323	40,335
Portugal	25,214	734	70,976	2,276	66	11,440
Romania	12,361	1,288	50,851	3,909	407	65,962
Spain	16,579	761	174,178	4,577	210	115,055

Source: analysis of FADN data

### Farms specialising in mixed cattle: average farm results in euro (three-year period 2020-2022)

	GP/ha	GP/LU	GP/WU	NR/ha	NR/LU	NR/FWU
France	968	938	77,487	215	209	18,855
Germany	1,900	1,778	96,236	301	281	18,051
Greece	3,084	744	26,944	1,558	376	16,694
Ireland	1,034	874	39,866	393	332	15,627
<b>Italy</b>	<b>1,761</b>	<b>1,555</b>	<b>61,735</b>	<b>891</b>	<b>786</b>	<b>36,034</b>
Netherlands	5,989	1,250	116,360	643	134	13,489
Poland	1,022	1,078	13,755	439	463	6,011
Portugal	419	782	22,019	319	595	20,247
Romania	1,498	1,272	21,986	576	489	12,782
Spain	929	1,149	46,504	421	521	23,978

Source: analysis of FADN data

### Farms specialising in sheep and goats: average farm results in euro (three-year period 2020-2022)

	GP/ha	GP/LU	GP/WU	NR/ha	NR/LU	NR/FWU
France	1,281	2,080	74,030	333	541	22,872
Germany	768	1,704	58,260	289	641	28,359
Greece	2,258	1,325	27,656	1,198	703	17,520
Ireland	692	802	31,079	342	397	15,604
<b>Italy</b>	<b>1,107</b>	<b>1,680</b>	<b>44,147</b>	<b>687</b>	<b>1,042</b>	<b>30,862</b>
Portugal	402	816	14,120	342	694	13,134
Romania	1,509	1,157	22,189	598	459	11,614
Spain	1,123	1,602	60,205	493	704	36,713

Source: analysis of FADN data

# FOOD INDUSTRY

Production, employment and value added

Businesses and workers

Value of the agri-food system

## PRODUCTION, EMPLOYMENT AND VALUE ADDED

The food, drink and tobacco industry plays a key role within the national manufacturing sector. In 2023, it accounted for 10.6% of value added and 12.2% of employees, while, according to the latest available data for 2022, it accounted for 14.8% of the sold production value. The number of employees (in AWU) grew by 3.3% from 2022 to reach around 448,000 workers, while value added grew by 12.7% to €34.3 billion.

The products of the food industry with the greatest weight in sold production are those of the meat processing and preserving sector, milk and dairy industry, baked products and other food products. In the drink industry, wine is the product with the largest share in production value.



THE SIZE OF THE FOOD,  
DRINK AND TOBACCO  
INDUSTRY WITHIN THE  
MANUFACTURING SECTOR

**14.8%**  
of sold production  
value



**€144.7 billion**

**12.2%**  
employees



**€488,000**  
units

**10.6%**  
of value added



**€34.3 billion**

## BUSINESSES AND WORKERS

According to InfoCamere-Movimprese, in 2023 the Italian food and drink industry recorded 59,498 active businesses, representing 13.3% of the entire manufacturing sector. Businesses in the food industry represent the largest part of the total, with 55,665 active businesses, around 94% of the total. In 2023, the birth rate (given by the ratio of new registrations to active businesses) decreased by 3.8% compared to the previous year, with a balance of -2,459 active and dead businesses. In terms of regional distribution, 52% of active businesses are located in five regions: Sicily (13.3%), Campania (12.6%), Lombardy (10.1%), Apulia (8.1%) and Emilia-Romagna (7.9%).

The drink sector has significantly fewer production units than the food sector: 3,847 businesses were active in 2023. In this sector, too, the balance between new births and deaths

is -142 units and the birth rate falls by 3.1%. At territorial level, just over 60% of businesses in the drink sector are located in six regions: Campania (12.5%), Apulia (10.6%), Sicily (10.7%), Veneto (9.4%), Piedmont (8.8%) and Lombardy (8.4%). ISTAT data on employment in 2022 show that the food and drink sector employed 458,480 workers, accounting for 12% of the manufacturing sector. Specifically, the food industry employs 416,857 workers, with an average of 8.4 workers per business, which is lower than the average of the manufacturing sector equal to 10.4. Analysing the composition of the food industry by compartment, the largest share in terms of employees is the production of baked and flour-based products, which accounts for 35.9 % of employees and has an average size of 5 employees per business.

The drink industry employs 41,623

workers, with an average of 12 employees per business. The wine industry is the most important in terms of employment, with 47.5% of the workforce.

The average size of businesses in the agri-food and drink industry varies considerably from one region to another: in Calabria, the average number of employees per business is 3.7, while in Trentino it is 17.3.

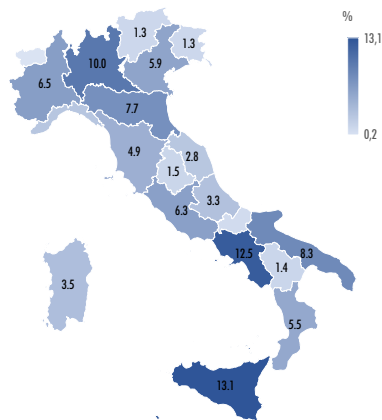
In terms of regional distribution, around 58% of food industry employees are located in the northern regions, while 30% are in the South and Islands. The drink industry is more concentrated in the North, with 67% of the workforce, while the South and Islands account for 23%.

The average business size in terms of employees is larger in the northern regions and is above average for both sectors. However, the specialisation index, measured at regional level through the share of employ-

ees in the food and drink industry over the manufacturing sector compared to the national average, shows

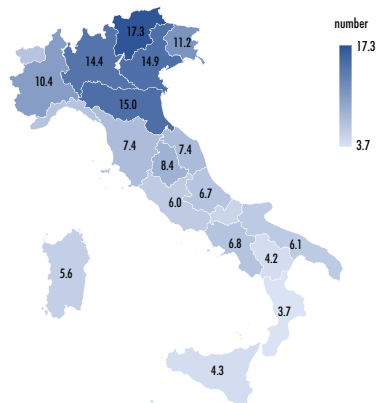
a higher specialisation in the regions of the South and Islands than in the northern regions.

**Businesses in the food and drink industry by region (share of Italian total), 2023**



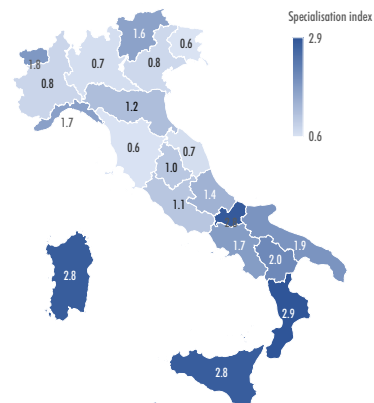
Source: Infocamere

**Workers by business in the food and drink industry (no.) 2022**



Source: ISTAT

**Food and drink specialisation by number of workers, 2022**



Source: ISTAT

## VALUE OF THE AGRI-FOOD SYSTEM

In 2023, the agri-food system as a whole – from agriculture to food service – generated an estimated value in terms of turnover of approximately €676 billion, representing around 15% of the entire economy.

Turning our attention to economic trends, the value of turnover increased by 6% over 2022, partly due to rising prices. All areas contributed to this positive performance, particularly food service: with growth of around 12%, the latter has almost returned to pre-pandemic levels.



THE AGRI-FOOD SYSTEM  
HAS A TURNOVER OF  
**€676 BILLION**



**15% OF THE ENTIRE  
ECONOMY**

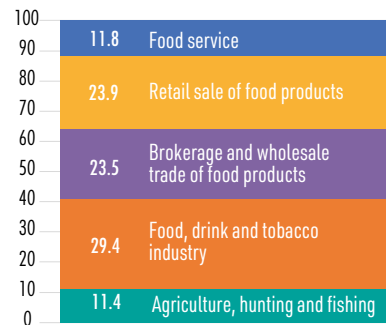


VARIATION IN  
OVERALL  
TURNOVER



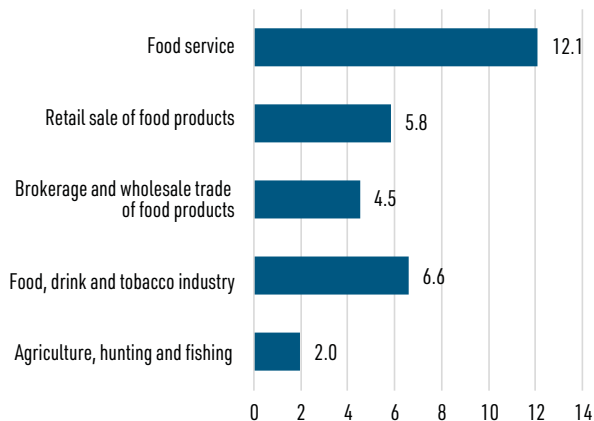
2023/2022  
**+6%**

Composition of the value chain of the complete agri-food system (% weight), 2023



Source: ISTAT

## Variation in turnover of the agri-food system 2023/2022 (%)



Source: ISTAT

## Estimation methodology

The value of the chain is estimated using ISTAT "Businesses-Competitiveness" and "National Accounts" data, considering the following components:

- Agriculture, forestry and fishing
- Food, drink and tobacco industry
- Brokerage of food products, drinks and tobacco, and brokerage of agricultural raw materials, live animals, textile raw materials and semi-finished goods
- Wholesale of agricultural raw materials and live animals
- Wholesale of food products, drinks and tobacco products
- Retail sale, specialised and non-specialised, with food products, drinks and tobacco predominating.
- Retail sale of food products, drinks and tobacco in specialised businesses
- Retail sale of flowers, plants, seeds, fertilisers, pets and pet food in specialised businesses
- Street retail sale of food products and drinks
- Food service activities

# ITALY V. THE EU

UAA

Farms by uaa category

Production and value added

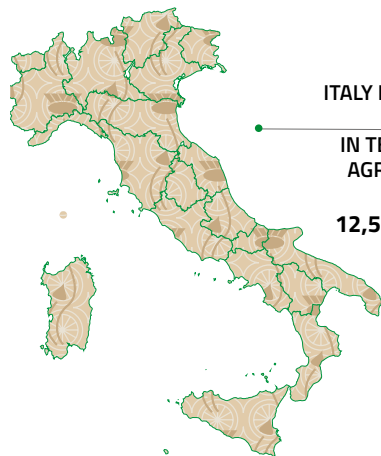
Plant production

Livestock production

Intermediate consumption

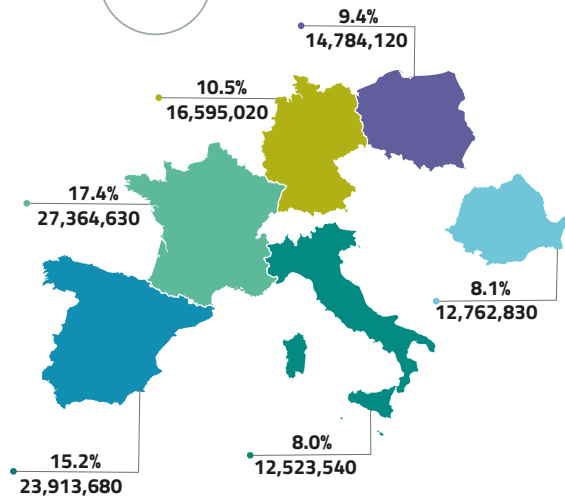
Work and employment

Food and drink industry



ITALY RANKS **6<sup>th</sup>** AMONG THE EU 27 IN TERMS OF UTILISED AGRICULTURAL AREA WITH **12,523,540 HECTARES (8%)**

UAA  
(%, HECTARES)



Source: Eurostat, 2020

## FARMS BY UAA CATEGORY

ITALY HAS THE **3<sup>rd</sup>**  
HIGHEST NUMBER OF  
FARMS  
IN THE EU 27



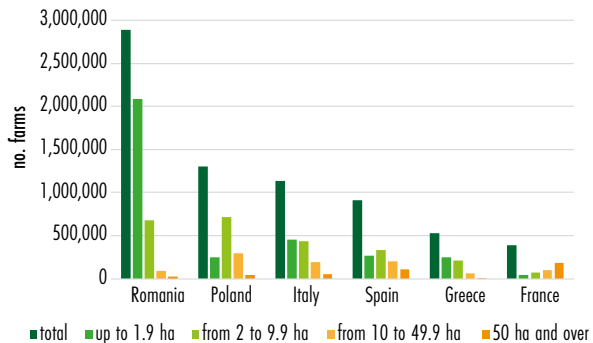
**1,133,020**  
FARMS



**80%**

CONSIST OF ENTERPRISES  
WITH FEWER THAN  
**10 HECTARES OF UAA**

Number of farms by farm size, 2020



Source: Eurostat

## PRODUCTION AND VALUE ADDED



In terms of agricultural production, Italy ranks third behind France and Germany, with a current value of €71,851 billion



71,851 BILLION



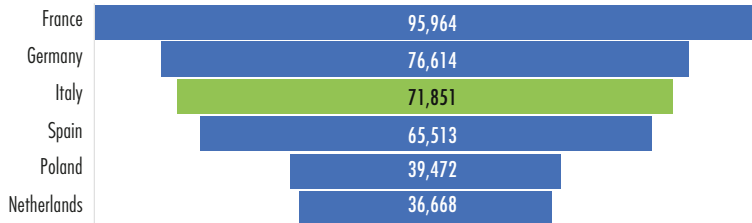
In terms of value added, Italy is second only to France, with a current value of €38,198 billion



38,198 BILLION

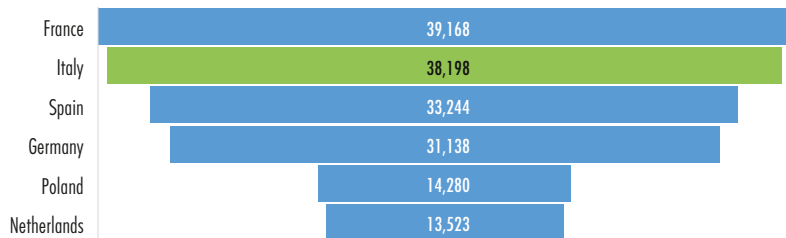


### Production in agriculture, 2023 (€ mln at current values)



Source: Eurostat.

### Value added in agriculture, 2023 (€ mln at current values)



Source: Eurostat.



## PLANT PRODUCTION



Weighing in at **12,818,640** tonnes, Italian plant production represents **22%** of the EU total, second only to Spain's 13,519,140 tonnes (23%).

### EUROPEAN LEADER



**Rice**  
**1,378,640** tonnes (62%)



**Durum wheat**  
**3,829,130** tonnes (53%)



**Tomatoes**  
**6,016,050** tonnes (38%)

### SECOND PLACE



**Citrus fruits**  
**3,179,780** tonnes (30%)



**Peaches**  
**724,270** tonnes (30%)



**Olives for oil**  
**2,681,720** tonnes (29%)

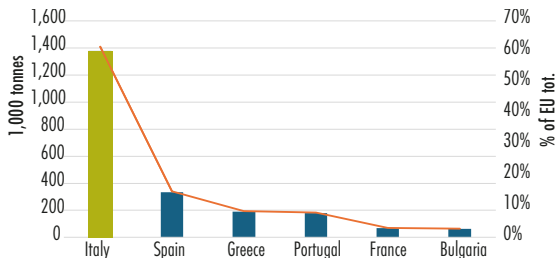


**Grapes for wines**  
**5,845,210** tonnes (28%)



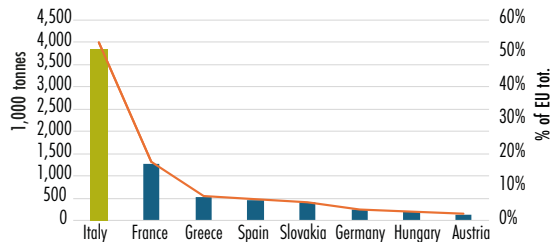
**Apples**  
**2,267,750** tonnes (19%)

### Production of rice, 2023



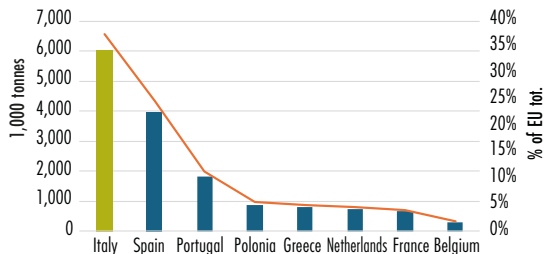
Source: Eurostat.

### Production of durum wheat, 2023



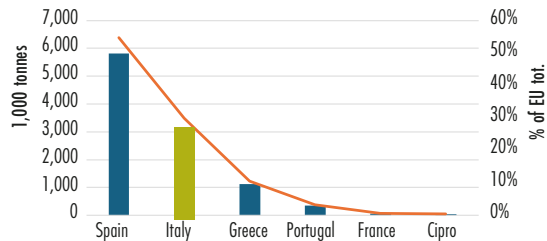
Source: Eurostat.

### Production of tomatoes, 2023



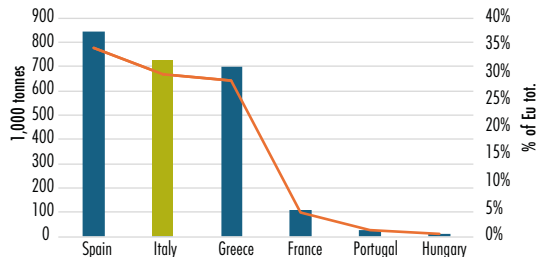
Source: Eurostat.

### Production of citrus fruits, 2023



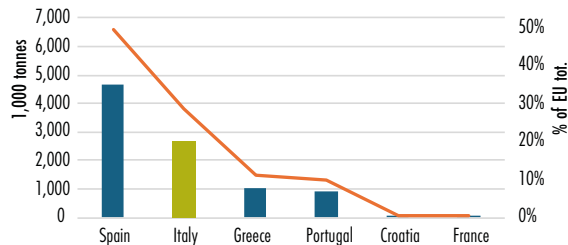
Source: Eurostat.

### Production of peaches, 2023



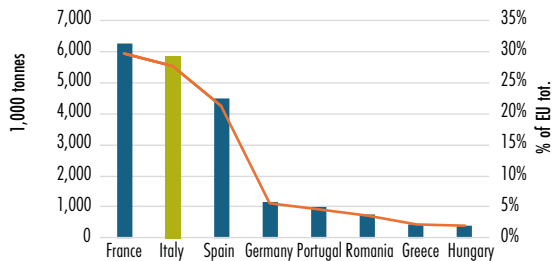
Source: Eurostat.

### Production of olives for oil, 2023



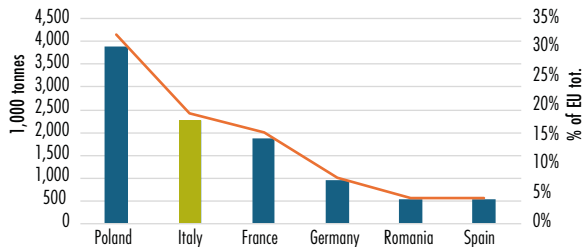
Source: Eurostat.

### Production of grapes for wine, 2023



Source: Eurostat.

### Production of apples, 2023



Source: Eurostat.

# LIVESTOCK PRODUCTION



## LIVESTOCK PRODUCTION IN ITALY



**Poultry meat**  
1,334,140 tonnes (11%)

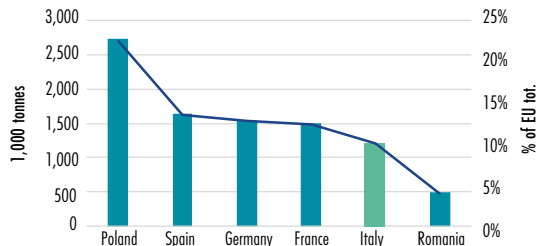


**Bovine meat**  
619,850 tonnes (10%)



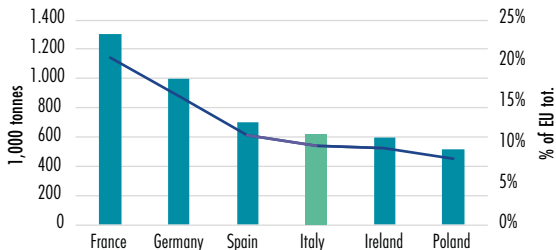
**Pigmeat**  
1,205,870 tonnes (6%)

### Production of poultry meat, 2023



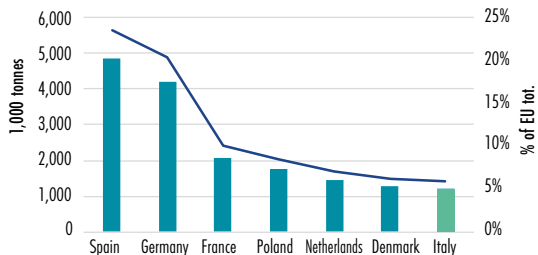
Source: Eurostat.

### Production of bovine meat, 2023



Source: Eurostat.

### Production of pigmeat, 2023



Source: Eurostat.

## DAIRY SECTOR



### Cheese

**1,344,110** tonnes (13%)



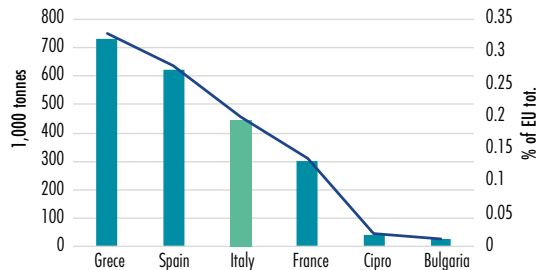
### Drinking milk

**2,468,470** tonnes (12%)

of which milk from sheep:

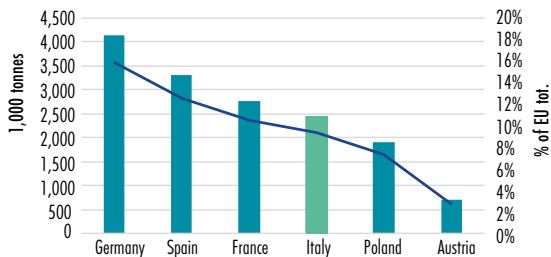
**444,590** tonnes (20%)

## Production of ewe's milk, 2023



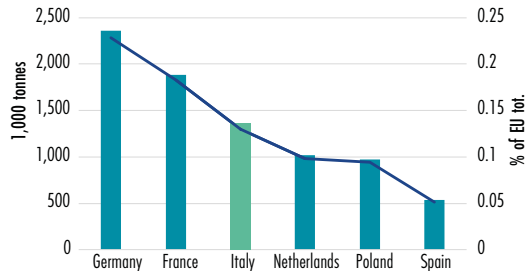
Source: Eurostat.

## Production of drinking milk, 2023



Source: Eurostat.

## Production of cheese, 2023



Fonte: Eurostat.

## INTERMEDIATE CONSUMPTION

Within the EU, Italy has the lowest ratio of intermediate consumption to the total value of agricultural output. Compared to an EU-27 average of 58%, the weight of intermediate

consumption in Italy is 46.8%, a reduction of almost two percentage points compared to 2022. This highlights the greater diversification of Italian production systems

compared to our European partners, especially with regard to the north-central countries, which are characterised by a high degree of specialisation.

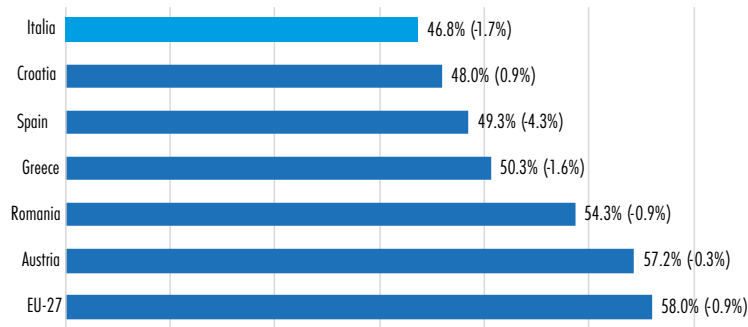


### WEIGHT OF INTERMEDIATE COSTS

EU 27  
Average  
**58%**

Italian  
Average  
**46.8%**

Intermediate consumption as a proportion of agricultural production (2023) and variation compared to 2022



Source: Eurostat



## AGRICULTURAL EMPLOYEES



ITALY RANKS 3<sup>RD</sup> PLACE WITH  
AROUND  
**950,000 UNITS**

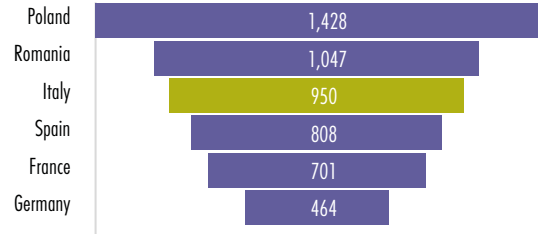
**EU-27**  
**7,600,020 UNITS**



**UNSALARIED**  
**ITALY 66%**

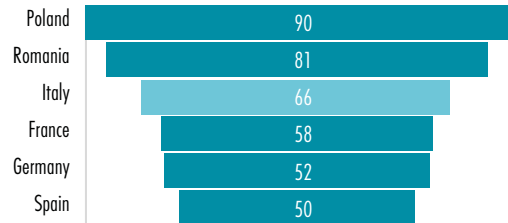
**EU-27 70%**

## Work units in agriculture, 2023



Source: Eurostat.

## Work units in agriculture - % unsalaried, 2023



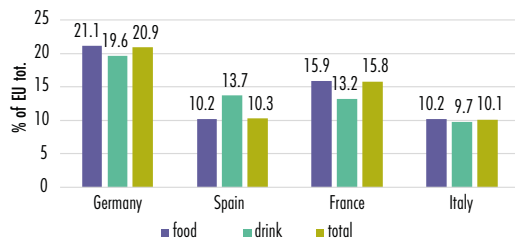
Source: Eurostat.



THE ITALIAN FOOD AND DRINK INDUSTRY IS AMONG THE TOP FOUR COUNTRIES IN THE EU BY:

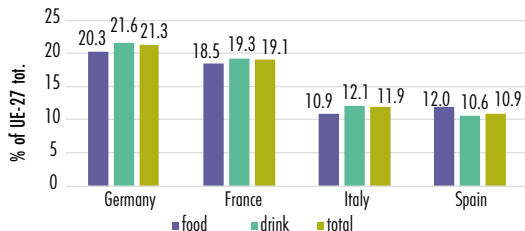
- NUMBER OF EMPLOYEES
- VALUE ADDED
- TURNOVER

**Food and drink industry - top four countries in the EU-27 by number of employees, 2021**



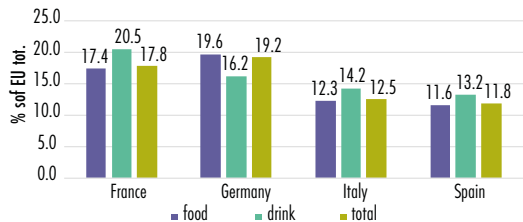
Source: Eurostat.

**Food and drink industry - top four countries in the EU-27 by value added, 2021**



Source: Eurostat.

**Food and drink industry - top four countries in the EU-27 by turnover, 2022**



Source: Eurostat.

# DOMESTIC MARKET AND FOREIGN DEMAND

Food consumption

Distribution

Food service

Foreign trade

## FOOD CONSUMPTION

In 2023, the average monthly household consumption expenditure of families residing in Italy was €2,738 at current values (+4.3% compared to 2022). However, growth in real terms is reduced by 1.5% due to the effect of inflation (+5.9% change in the harmonised consumer price index on an annual basis).

Even in 2023, households were obliged to alter their purchasing habits, particularly in terms of foodstuffs, by limiting the quantity or quality of food purchased. According to the ISTAT survey, Household consumption expenditure - 2023, the proportion of households exhibiting prudent food purchasing behaviour increased to 31.5%, up from 29.5% in 2022.

Despite a marked increase in the prices of foodstuffs and soft drinks (+10.2%), household spending on the purchase of these products increased by 9.2% compared to the



### AVERAGE MONTHLY EXPENDITURE ON FOOD AND DRINKS

**€526 (19.2%)**  
of total spending



- **€505.28** 17% of total spending
- **€518.03** 17.5% of total spending
- **€518.10** 17.8% of total spending
- **€550.87** 25% of total spending
- **€542.25** 23.4% of total spending

### AVERAGE MONTHLY EXPENDITURE BY FOODSTUFF



Meat  
**€110.69**



Bread and cereals  
**€82.56**



Vegetables and pulses  
**€68.66**



Milk, cheese and eggs  
**€64.68**



Fruit  
**€44.23**



Fish and fish products  
**€39.49**



Sugar and confectionary products  
**€22.95**

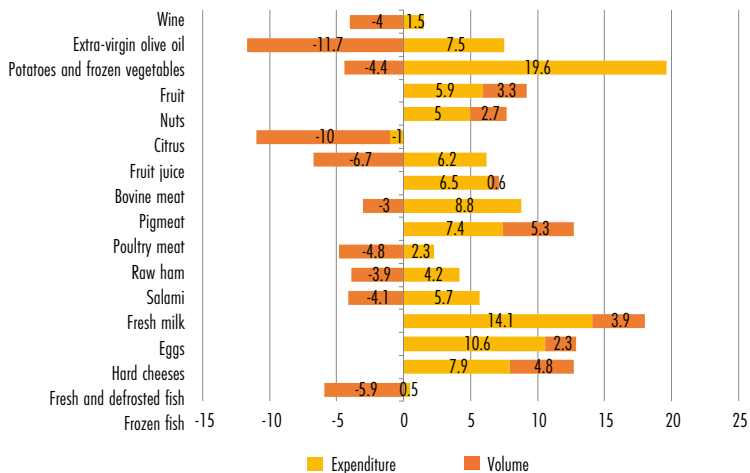


Oils and fats  
**€16.56**

previous year (€526 monthly, accounting for 19.2% of total expenditure).

According to Osservatorio Ismea-Nielsen IQ data, the increase in spending on food and drinks remains the highest in recent years while volumes decline for most of the main agri-food products. This source also confirms that Italians are more prudent in their purchasing choices: purchases (in volume) of high-end products such as extra-virgin olive oil and raw ham, especially designated, decreased, but also of products with a high processing content, such as ready meals (-3%), fresh-cut salads (-3.2%), snacks (-1.4%), ice cream (-4.4%), fruit juices (-6.7%), tinned fish (-6.2%), and alcoholic drinks (-5%).

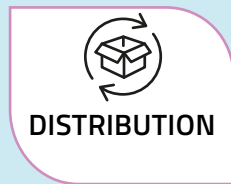
### % variations in volumes and expenditure regarding household purchases of some main products, 2023/2022



Source: Ismea analysis of Osservatorio Ismea-NielsenIQ data

## DISTRIBUTION

The number of traditional food stores, at 82,551 in 2023, decreased by 27.3% compared to 2022 (MISE data). Specialised retail stores also recorded a decline in all categories: bakeries suffered the most (-7.1%), followed by fruit and vegetable stores (-6.8%), butcher shops (-6.3%) and fishmongers (-6%), frozen food (-4.1%) and drink retailers (-2.9%). On the other hand, the number of modern distribution outlets remained stable at 25,116 (Federdistribuzione data). With the increase in online shopping (+92.6% in 2023, Confcommercio data), physical stores are declining in many urban centres. Large sales outlets remain historically widespread, especially in central and northern regions, while local shops and discount stores in southern regions. Street vendors of foodstuffs resist, numbering 30,888, spread mainly in local markets.



### 82,551 RETAIL BUSINESSES

SELLING FOODSTUFFS

(BUTCHER SHOPS, GREENGROCERS, BAKERIES, FISHMONGERS, FROZEN FOOD OUTLETS AND DRINK RETAILERS)

### 25,116 LARGE-SCALE RETAIL OUTLETS

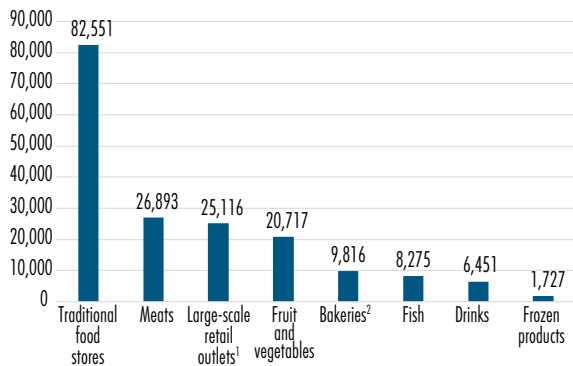
SELLING FOODSTUFFS

(HYPERMARKETS, SUPERMARKETS, DISCOUNT STORES)

According to ISTAT data, total food sales in 2023 are stationary in value and slightly down by 0.4% in volume. The value of retail sales increased for large-scale retailers (+2.7%) and more modestly for businesses operating on small areas (+1.6%). The 17% increase in consumer prices has had a negative impact on consumer purchasing power, generating a loss in sales in real terms estimated at around 3% (Confcommercio data), the effects of which are felt above all in local shops.

The large-scale retail sector accounts for almost 81% of Italians' food purchases, with a turnover of €168 billion in 2023 (+8.4% compared to 2022). There are more than 438,000 employees in the sector, plus another 3 million in the supply chains, accounting for 20% of the country's total employment (Ambrosetti data).

## Food retail outlets in fixed locations, 2023

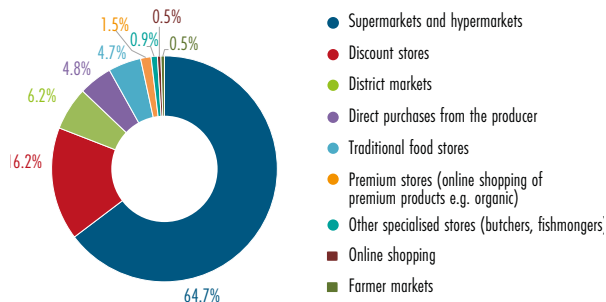


<sup>1</sup>Including hypermarkets, superstores, supermarkets, large free-service areas, discount stores

<sup>2</sup>Including confectionery and sweets shops.

Source: Ministry of Economic Development (MISE) and Federdistribuzione

## Usual grocery shopping channel (% of total), 2023



Source: The European House-Ambrosetti survey to Italian consumers, 2024

## FOOD SERVICE

As of 31 December 2023, there were 331,178 businesses active in commercial and collective food service (i.e. canteens and catering activities), with a drop of 1.2% compared to the previous year. This figure, according to the Italian association for the industry, FIPE, should not necessarily be read as a negative sign: against a reduction in the bar channel (-3%) there is a structuring of the offer, with a strengthening of skills and an updating of formats. In 2023, about 50% of public establishments in the sector made at least one investment, mainly in renewing equipment, controlling energy consumption and upgrading technology. Female entrepreneurship accounts for 29% of the total, while that of young people under 35 accounts for 12.3%. Foreign entrepreneurship, on the other hand, exceeds 14% and expresses some excellence but also some forms of self-employment of



### FOOD SERVICE

**€54.5 billion in value  
added for the sector**

**+11.3%**  
compared  
to 2022

**€92 billion  
on consumption**  
**+12,2%**

necessity. Dependent employment is back above pre-pandemic levels, at 1,070,839 (+8.5% compared to 2022).

In terms of economic performance, 90% of businesses improved or confirmed their 2022 turnover, following price adjustments (+5.8%) as an unavoidable consequence of rising costs and soaring inflation. Price increases did not discourage customers: in addition to the recovery in tourism, there is the consolidation of certain consumption trends, such as evening outings and aperitifs, which marked an increase in household spending in the food service sector.

## Active food service businesses, 2023

	Restaurants and street food service	Bars and other similar businesses without a kitchen	Canteens and catering	Total
Piedmont	13,769	9,038	198	23,005
Aosta Valley	683	419	5	1,107
Lombardy	26,706	20,984	725	48,415
Trentino - South Tyrol	3,255	2,255	76	5,586
Veneto	14,243	10,482	202	24,927
Friuli-Venezia Giulia	3,740	2,954	46	6,740
Liguria	7,111	4,979	83	12,173
Emilia-Romagna	14,103	10,257	194	24,554
Tuscany	14,156	7,513	316	21,985
Umbria	2,707	1,879	64	4,650
Marche	5,011	2,780	70	7,861
Lazio	21,569	13,062	424	35,055
Abruzzo	5,224	3,267	87	8,578
Molise	1,016	832	25	1,873
Campania	19,374	14,255	420	34,049
Apulia	11,993	8,005	194	20,192
Basilicata	1,483	1,308	42	2,833
Calabria	6,811	4,315	130	11,256
Sicily	16,011	8,580	278	24,869
Sardinia	6,506	4,840	124	11,470
<b>Italy</b>	<b>195,471</b>	<b>132,004</b>	<b>3,703</b>	<b>331,178</b>

Source: FIPE report on food service, 2023

## FOREIGN TRADE

The year 2023 marked new heights for the Italian agri-food trade, both in terms of imports, which reached a value of €64.7 billion (+4,1%), and of exports, which exceeded €63 billion (+6.6%). These trends produced an improvement in the agri-food balance, after the worsening in the last two years. In 2022, in fact, the surge in international prices saw the balance drop to negative €5.5 billion, which stood at -3 billion. In 2023, agri-food exports grew again more than imports (+3.9 billion in exports against +2.6 billion in imports), leading to an improvement in the agri-food balance deficit, which stood at -€1.64 billion.

In 2023, 59.4% of Italy's agro-food exports and 70.5% of its imports were concentrated in the EU-27, shares that increased compared to 2022. In terms of exports, the weight of the United States, the third market of destination for Italian agri-food



### THE AGRI-FOOD BALANCE 2023

	(€ billion)	% var. 2023/22
Exports	63.1	+6.6%
Imports	64.7	+4.1%
Balance	-1.6	

products, decreased after the positive series of recent years. In 2023, the value of exports to this market continued to grow (+2%), but less than other markets, mainly due to lower flows of wine and pasta. On the other hand, exports to Italy's two main markets of destinations, Germany and France, increased by around 10%. The increase in the value of sales to the United Kingdom (+7.8%) is also significant.

In terms of imports, the share of the Asian market has declined after rising in recent years, with imports from Indonesia and China falling by 16% and 21.5% respectively. This dynamic is partly due to the crisis affecting the Red Sea since the end of 2012. Flows from Greece grew strongly (+30.5%), especially those of olive oil and dairy products.

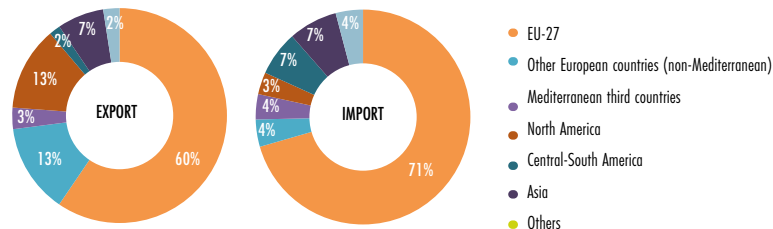
As regards the make-up of goods, the growth in exports mainly concerns the food industry (+7.7%)

and the primary sector (+5.5%), to a lesser extent the drinks industry (+2.2%). Imports increased by around 4% for the primary sector and the food industry, and by more than 7% for the drinks industry.

The growth in exports was felt across the board, by almost all leading products, with the exception of a few items such as PDO wines, liqueurs and animal feed. The trend in value of imports is more diversified at product level. Some items, such as raw coffee and seed oils, show a clear drop in quantity and especially in value, after last year's increases. On the other hand, foreign purchases of other products, such as semi-processed pork (+35% in value) and sugar (+45%), grew.

It should be stressed that in many cases, for both imports and exports, increases in value are accompanied by smaller increases or decreases in the volume of trade.

### Italy's commercial interexchanges by geographic area, 2023



Source: CREA-PB analysis of ISTAT data

### Italy's main agri-food trade products

EXPORT	2023 Value (€ billion)	% var. 2023/22
Tinned and peeled tomatoes	2.85	+16.0%
Pasta, excluding egg-based and stuffed pasta	2.84	+1.3%
Cocoa-based confectionary products	2.53	+6.4%
Biscuits and pastry products	2.40	+11.9%
Roasted, non-decaffeinated coffee	2.26	+6.8%
IMPORT	2023 Value (€ billion)	% var. 2023/22
Processed fish	3.03	+3.7%
Raw coffee	1.99	-9.0%
Animal feed panels	1.96	-3.0%
Extra-virgin olive oil	1.90	+7.6%
Frozen crustaceans and molluscs	1.82	-9.6%

Source: CREA-PB analysis of ISTAT data

## Exports of "Made in Italy" agri-food products\*

	2023	% variations 2023/2022	
	(€ mln)	Current values	Quantity
Cereals	11,5	47,8	14,8
Fresh fruit	3,052.8	7,8	-5,3
Fresh vegetables	1,629.1	19,9	6,6
Floriculture products	961.1	0,0	-2,9
<b>MADE IN ITALY - AGRICULTURE</b>	<b>5,654.6</b>	<b>9,6</b>	<b>-2,3</b>
Rice	916.9	17,5	0,6
Processed tomatoes	3,251.8	16,2	-5,8
Fruit juices and cider	741.7	3,9	-3,8
Other prepared or preserved fruits or vegetables	1,844.7	10,5	3,1
Charcuterie	2,266.4	8,3	5,2
Cheeses	3,126.3	10,4	5,4
Olive oil	2,148.2	13,9	-17,1
Packaged wine	7,545.3	-0,5	-2,8
Bulk wine	411.4	2,1	10,4
Vinegar	307.3	3,3	0,3
Mineral water	808.9	23,9	5,8
Essences	205.9	27,8	41,5
Other processed products	1,911.5	21,1	10,2
<b>MADE IN ITALY - PROCESSED</b>	<b>25,486.5</b>	<b>8,7</b>	<b>-0,2</b>
Pasta	4,039.1	3,5	-2,1
Baked goods	3,878.2	13,2	1,7
Other cereal derivatives	413.4	5,3	7,4
Cocoas-based confectionary products	2,532.9	6,4	-4,0
Ice creams	345.0	-4,7	-11,3
Coffee	2,258.6	6,8	-0,2
Spirits and liqueurs	1,500.7	-0,7	-11,8
<b>MADE IN ITALY - FOOD INDUSTRY</b>	<b>14,967.8</b>	<b>6,2</b>	<b>-1,6</b>
<b>MADE IN ITALY TOTAL</b>	<b>46,108.9</b>	<b>8,0</b>	<b>-1,0</b>

\* The categories in this table consist of agri-food products which yield stable, positive results and which famously symbolise Italy and its national image

Source: CREA-PB analysis of ISTAT data

Made in Italy products represented 73.1% of Italian agri-food exports in 2023, reaching a value of around €46 billion. This share is one percentage point higher than in 2022, thanks to the stronger growth of Made in Italy exports (+8%) compared to the total agri-food sector (+6.6%).

By classifying Made in Italy products according to the level of processing, it is possible to distinguish three aggregates: Made in Italy agricul-

tural products, Made in Italy processed products and Made in Italy food industry. In 2023, the value of exports of the Made in Italy agricultural products accounted for 12.3% of the total exports of the Made in Italy agri-food sector, amounting to around €5.6 billion (+9.6% compared to 2022). The Made in Italy processed products, driven by an 8.7% increase, nearly reached €25.5 billion in 2023, accounting for 55.3%

of the total Made in Italy. Notable sales growth is observed in cheeses (+10.4%), charcuterie (+8.3%) and processed fruit and vegetables (+10.5%). The Made in Italy food industry shows an increase in exports of 6.2%, reaching €15 billion. This growth is mainly driven by higher exports of baked goods (+13.2%), worth almost €3.9 billion in 2023.



# NUTRITION AND FOOD CULTURE

Organic farming

Designated products

Traditional agri-food products

Agritourism and food and wine tourism

Food waste

## ORGANIC FARMING

The positive results of organic farming confirm the sector's centrality for Italy. In 2023 the organic UAA involved just under 2.5 million hectares, one fifth of the national UAA (19.8%), a figure that brings the country ever closer to the European target of 25% organic UAA by 2030.

In the last year, organic UAA grew by 4.5%, a performance to which most Italian regions contributed, with few exceptions. There has been a significant increase in organic UAA in Sicily (+26,000 hectares), Trentino-South Tyrol (+21,662 ha), Tuscany (+15,223 ha) and Basilicata (+12,714 ha); while the number of hectares farmed organically in Veneto (-6.4%), Apulia (-3%) and, to a lesser extent, in Lombardy (-0.8%) and Emilia-Romagna (-0.7%) has decreased. The number of organic operators also increased in 2023 (+1.3%)



ITALIAN ORGANIC UAA  
**2.5 MILLION HECTARES**



ORGANIC UAA/TOTAL  
**19.8%**



### 6 REGIONS HAVE EXCEEDED THE 25% THRESHOLD

<b>TUSCANY</b>	<b>37.5%</b>
<b>LAZIO</b>	<b>27.0%</b>
<b>MARCHE</b>	<b>28.2%</b>
<b>BASILICATA</b>	<b>27.6%</b>
<b>CALABRIA</b>	<b>35.7%</b>
<b>SICILY</b>	<b>28.8%</b>

**UAA** **>= 25%**

## Organic operators by region, 2023

	"Exclusive producers"		"Producers/processors"		Exclusive processors		Total operators <sup>1</sup>	
	no.	% var. 2023/22	no.	% var. 2023/22	no.	% var. 2023/22	no.	% var. 2023/22
Piedmont	2,040	-0.6	699	1.2	597	-5.7	3,345	-2.7
Aosta Valley	26	-10.3	13	0.0	8	-69.2	72	5.9
Lombardy	1,443	-2.6	551	5.0	1,086	-3.6	3,082	-5.5
Liguria	296	5.7	108	-0.9	152	1.3	557	-0.9
Trentino-South Tyrol	2,600	14.2	565	76.0	622	26.4	3,828	23.0
Veneto	1,831	-9.5	674	-3.0	962	-2.7	3,483	-8.1
Friuli-Venezia Giulia	730	3.0	194	-1.0	197	-6.6	1,121	-0.4
Emilia-Romagna	4,651	-2.1	815	-1.5	1,041	-0.6	6,516	-2.7
Tuscany	4,712	9.1	2,228	7.7	697	5.3	7,671	8.2
Umbria	1,511	11.4	410	5.1	177	-2.7	2,098	8.2
Marche	3,326	-0.4	600	2.4	260	-10.0	4,186	-0.9
Lazio	4,376	-1.0	726	-1.6	473	-6.3	5,575	-2.0
Abruzzo	1,806	6.9	387	1.3	287	-4.0	2,480	4.5
Molise	636	78.7	75	-5.1	71	-9.0	782	51.8
Campania	6,244	2.5	549	-0.2	639	0.2	7,432	1.5
Apulia	8,981	-2.4	1,473	0.9	892	21.5	11,346	-0.5
Basilicata	3,013	1.3	151	2.0	116	4.5	3,280	1.4
Calabria	8,094	-0.8	1,938	1.3	355	-2.2	10,387	-0.5
Sicily	11,083	1.0	2,178	2.7	940	-0.7	14,201	0.9
Sardinia	2,238	5.3	196	5.9	129	-1.5	2,563	5.0
Italy	69,637	1.5	14,530	3.8	9,701	0.9	94,005	1.3
North	13,617	0.1	3,619	7.2	4,665	-0.2	22,004	-0.2
Centre	13,925	3.7	3,964	4.8	1,607	-1.9	19,530	3.1
South and islands	42,095	1.3	6,947	1.6	3,429	3.9	52,471	1.3

<sup>1</sup>The sum of producers and processors does not match the total operators, as this figure also includes importers

Source: analysis of SINAB data.

from 2022), but at a slower rate than in 2021-2022 (+7.7%). At territorial level, the increase in percentage terms mainly concerns Molise (+52%) and Trentino-South Tyrol (+23%), although Tuscany also shows a significant growth in absolute terms, with +582 organic operators (+8.2%). It is mainly the share of producers-processors that increases (+3.8%), while the share of sole processors increases more moderately (+0.9%) and exclusively in the South and Islands (+4%).

The average size of the organic farm in 2023 is 29.3 hectares, up 1% compared to 2022 and larger than the conventional one (11 hectares). The increase concerns 10 regions, with a peak for Valle d'Aosta, which goes from 31 hectares in 2022 to an impressive 51.3 in 2023; conversely, in Sardinia and Tuscany the average farm size decreases, albeit slightly, and in 7 other regions it remains unchanged.

The organic area devoted to arable crops (44.6% of the total organic UAA) has increased compared to 2022 (+3.3%). Permanent pastures and grassland are the only component that not only increased the UAA compared to 2022 (10.1%), but also increased its relative weight (from 28.2% in 2022 to 29.7% in 2023). Among arable crops, industrial crops (13%) and fodder crops (11.4%) show a positive change. In contrast, there is no change in the area dedicated to permanent crops, which account for 23% of the total organic UAA in 2023.

In 2023 several organic livestock species underwent a reduction in livestock numbers, in particular, the number of organic pigs decreased by 17%, while goats and sheep decreased by 7.5% and 5.7% respectively. In contrast, poultry (10.7%) and cattle (3.8%) LUs increased, albeit to a lesser extent than in 2021-2022.

### Organic surface by region, 2023

	Organic UAA <sup>1</sup>			Proportion of total UAA <sup>2</sup>	
	ha	%	% var. 2023/22	farm av. (ha)	%
Piedmont	57,567	2.3	5.4	21.0	6.3
Aosta Valley	2,000	0.1	53.4	51.3	3.2
Lombardy	53,758	2.2	-0.8	27.0	5.5
Liguria	7,823	0.3	10.4	19.4	18.5
Trentino-South Tyrol	50,958	2.1	73.9	16.1	16.3
Veneto	44,984	1.8	-6.4	18.0	5.6
Friuli-Venezia Giulia	21,496	0.9	5.9	23.3	9.6
Emilia-Romagna	192,015	7.8	-0.7	35.1	18.4
Tuscany	244,293	9.9	6.6	35.2	37.5
Umbria	58,306	2.4	18.2	30.4	19.3
Marche	128,307	5.2	5.7	32.7	28.2
Lazio	173,205	7.1	-0.4	33.9	27.0
Abruzzo	70,614	2.9	15.1	32.2	17.2
Molise	20,810	0.8	68.8	29.3	11.2
Campania	102,895	4.2	1.1	15.1	20.4
Apulia	311,067	12.7	-3.0	29.8	23.9
Basilicata	132,089	5.4	10.7	41.7	27.6
Calabria	195,571	8.0	1.0	19.5	36.3
Sicily	413,202	16.8	6.7	31.2	30.7
Sardinia	175,059	7.1	2.1	71.9	14.3
Italy	2,456,019	100.0	4.5	29.2	19.5
North	430,601	17.5	5.5	25.0	9.8
Centre	604,111	24.6	5.3	33.8	29.5
South and islands	1,421,307	57.9	3.9	29.0	23.7

<sup>1</sup> Organic UAA and UAA under conversion.

<sup>2</sup> Total UAA from 2020 Agriculture Census, ISTAT.

Source: analysis of SINAB and ISTAT data

## Organic surface area by type of production, 2023

Type of production	UAA (ha)				proportion organic+under conv./total	UAA % variation 2023/22		
	under conversion	organic	total	of which under conv. (%)		under conversion	organic	total
<b>Arable crops total</b>	<b>185,931</b>	<b>908,557</b>	<b>1,094,487</b>	<b>17.0</b>	<b>44.6</b>	<b>-6.7</b>	<b>5.6</b>	<b>3.3</b>
of which								
Cereals	59,275	296,445	355,720	16.7	14.5	-13.9	1.7	-1.3
Protein, legume and grain crops	5,402	39,068	44,469	12.1	1.8	-29.8	-2.8	-7.1
Root crops	461	3,388	3,849	12.0	0.2	-3.2	6.2	5.0
Industrial crops	6,254	51,085	57,339	10.9	2.3	-5.9	15.9	13.1
Fresh vegetables, strawberries, cultivated mushrooms	9,149	51,026	60,175	15.2	2.5	-10.9	3.5	1.0
Fodder crops	87,259	394,191	481,450	18.1	19.6	12.8	11.1	11.4
Other arable crops	18,131	73,354	91,485	19.8	3.7	-35.3	-5.1	-13.1
<b>Permanent pastures and grassland</b>	<b>198,603</b>	<b>530,663</b>	<b>729,266</b>	<b>27.2</b>	<b>29.7</b>	<b>17.6</b>	<b>7.6</b>	<b>10.1</b>
<b>Permanent crops total</b>	<b>125,047</b>	<b>434,321</b>	<b>559,368</b>	<b>22.4</b>	<b>22.8</b>	<b>3.0</b>	<b>-0.7</b>	<b>0.1</b>
of which								
Fruit	7,161	32,397	39,558	18.1	1.6	-9.4	-8.6	-8.7
Nuts	15,120	48,935	64,055	23.6	2.6	17.2	3.9	6.8
Citrus	6,299	26,708	33,007	19.1	1.3	-4.3	-6.2	-5.8
Olives	63,975	215,791	279,766	22.9	11.4	8.0	0.7	2.2
Vines	30,081	102,925	133,006	22.6	5.4	-5.5	-0.9	-2.0
Other permanent crops	2,411	7,565	9,976	24.2	0.4	-18.4	-6.6	-9.8
<b>Fallow land</b>	<b>18,815</b>	<b>54,082</b>	<b>72,898</b>	<b>25.8</b>	<b>3.0</b>	<b>11.6</b>	<b>3.3</b>	<b>5.3</b>
<b>Total</b>	<b>185,949</b>	<b>908,575</b>	<b>2,456,019</b>	<b>7.6</b>	<b>100</b>	<b>4.3</b>	<b>4.6</b>	<b>4.5</b>

Source: analysis of SINAB data

### Numbers of organic livestock by type of species bred, 2023

	No. Animals	% var. 2023/22	% of total livestock <sup>1</sup>	LU <sup>2</sup>
Cattle	469,345	3.8	8.4	375,476
Sheep	538,751	-5.7	8.3	80,813
Pigs	54,591	-16.8	0.6	16,377
Goats	98,828	-7.5	10.1	14,824
Horses	25,567	13.0	15.5	25,567
Poultry	6,809,393	10.7	4.3	68,094
Bees (in number of hives)	217,111	-6.9		

<sup>1</sup>Total livestock (animal numbers) from 2020 Agriculture Census, ISTAT.

<sup>2</sup>LUs are estimated on the basis of the number of animals per species, as detailed data are not available regarding the different livestock categories.

Source: analysis of SINAB data



In 2023, the domestic market for organic food and drinks reached a turnover of €5.5 billion (+9% compared to 2022), thanks to a cautious recovery in household consumption (€4.2 billion, +6.7%), which grew in value (+2.2%) but not in volume (-3.5%), and to the excellent results of out-of-home consumption, amounting to €1.3 billion (+18%). The conditions of uncertainty and loss of household purchasing power contributed to keeping per capita consumption of organic products (€62 in 2022, down from €67 in 2021) among the lowest in Europe.

## DESIGNATED PRODUCTS

### Agri-food products

Italy occupies the leading position for PDO-PGI in the EU, with 324 registered products and four traditional specialities guaranteed (TSG). The largest category is that of fruits, vegetables and cereals with 126 registered products, but cheeses and charcuterie are the categories which add up to the highest production value: almost 60% for cheese and 25% for charcuterie. PDO/PGI agri-food products total a production value of €8.85 billion (Qualivita-Ismea 2022 data), with exports amounting to €4.6 billion.

The PDO and PGI segment acts as the driving force of Italian agri-food and encompasses 85,584 operators, 550.000 employees and 168 protection consortia.

PDO-PGI by sector (no.)	
	<b>Fruits, vegetables and cereals</b> 26
	<b>Cheeses</b> 56
	<b>Olive oils</b> 50
	<b>Charcuterie</b> 43
	<b>Bread and pastry products</b> 17
	<b>Condiments and spices</b> 7
	<b>Fresh meats</b> 6
	<b>Fish and crustaceans</b> 6
	<b>Pasta</b> 5
	<b>Products of animal origin</b> 5
	<b>Other</b> 3

### FOOD: 324



PDO 174

PGI 150

TSG 4

### WINE: 529



PDO 410

PGI 119

SPIRITS (GI) 35

## Wine

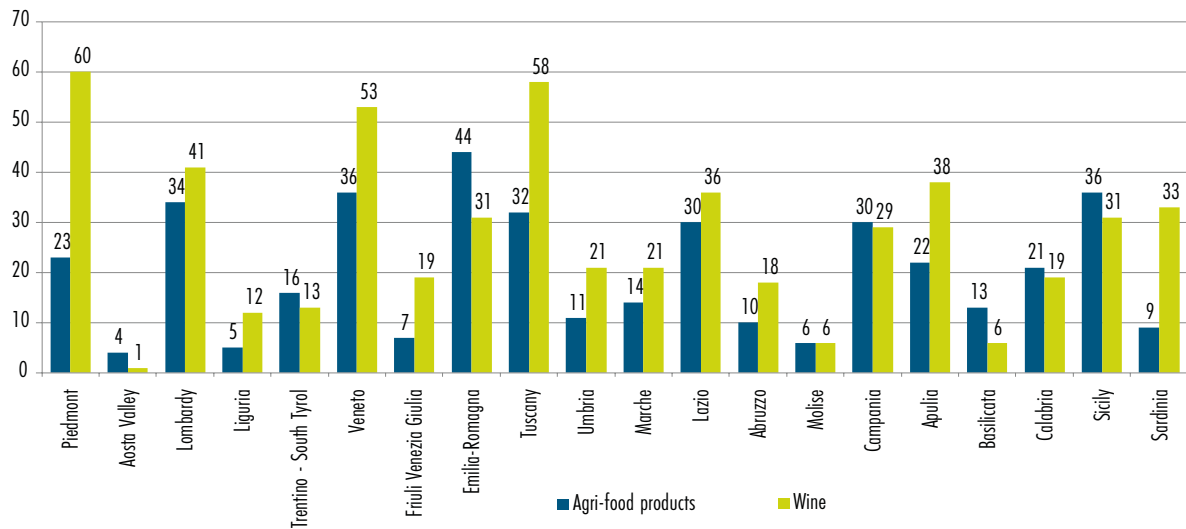
There are 529 Italian wines with geographical indications, of which 410 are PDOs, divided into 77 DOCGs and 333 DOCs according to the traditional Italian terminology; there are 119 PGIs.

In 2023, there was a general decline in PDO wine production (-17.4%), totalling 20.3 million hectolitres, in line with total wine production, which fell

even more sharply (-21.3%). The PGI wine component also fell (-17.8%), with production around 11.5 million hectolitres. The negative trend does not alter the weight of the PDO and PGI component in total wine production, which still accounts for more than  $\frac{3}{4}$  of the wine produced in Italy. Valorialitalia data show a stable trend in the volume of bottled wine, totalling 2.35 billion bottles (+0.54% com-

pared to 2022), and a slight decrease in the value of production, at €9.2 billion (-1.3%). Due to the global macroeconomic situation, Italian exports of PDO and PGI wines in 2023 did not record brilliant results in terms of volume or value: with a total value of 6.8 billion between packaged and bulk, they represent 85% of the total wine exported.

## PDO and PGI by region (no.)

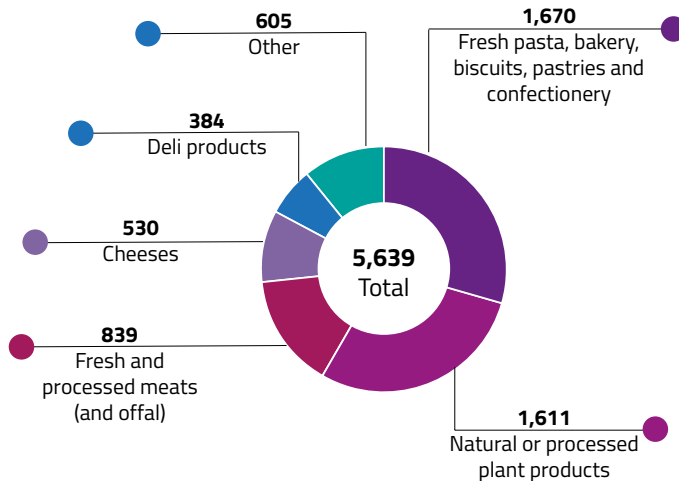


Updated: october 2024.

Source: Qualivita.

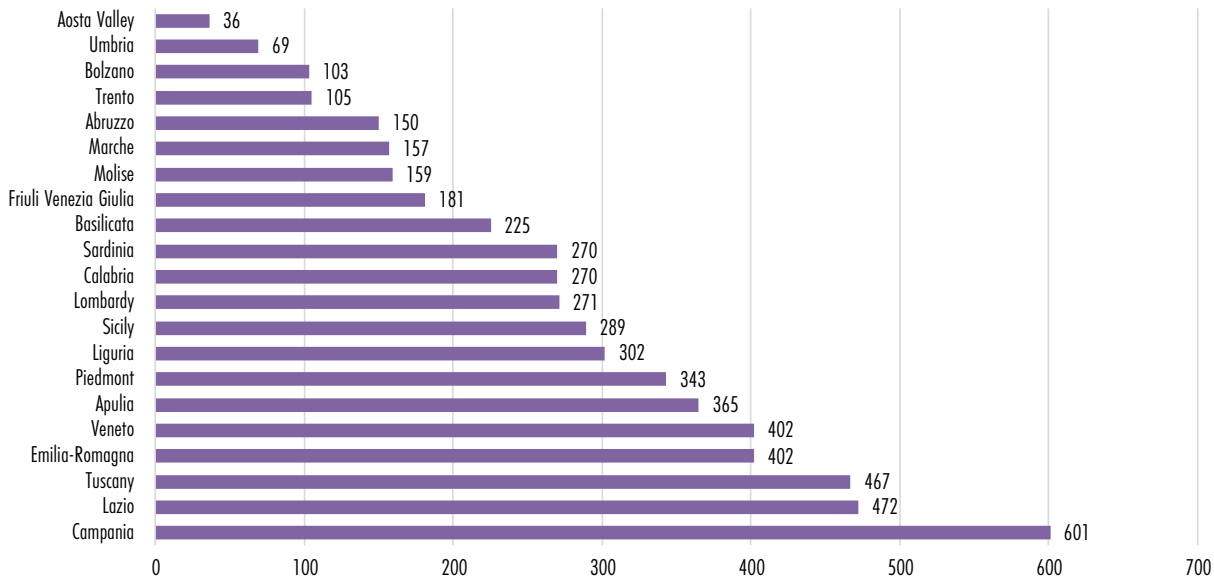
## TRADITIONAL AGRI-FOOD PRODUCTS

Italy's culinary heritage extends far beyond the products protected by the PDO and PGI system. Italian consumers can also choose from a broad range of regional traditional specialities, represented by the traditional agri-food products (TAP) which have been legally recognised as an element of Italian cultural heritage (under Italian Legislative Decree No. 173/98), on par with its historic, artistic and architectural assets. The specialities, which are updated annually by the regions, currently number 5,639 and include recipes, liqueurs, charcuterie, jams, fruits and vegetables, sweet items. Consumers can usually find them in their places of origin, at artisanal shops, restaurants, or the increasingly numerous and popular country fairs and festivals. The 2024 list contains 92 more products than in 2023



(+1.7%), among which the increase in gastronomy products stands out (+9%).

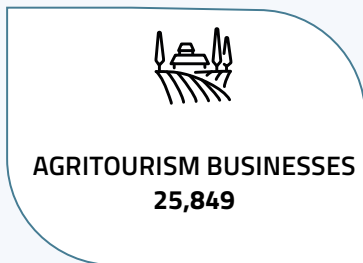
## Traditional agri-food products by region (no.), 2024



Fonte: 24<sup>th</sup> edition of the national list of traditional agri-food products, MASAF (Italian Ministry of Agricultural, Food and Forestry Policies) decree 29 February 2024

## AGRITOURISM AND FOOD AND WINE TOURISM

The growth trend of agritourism businesses continues, amounting according to the latest ISTAT data for 2022 to 25,849 structures (+1.8% compared to the previous year). The numbers are stable in the South and the Islands, while there has been an increase in the Northern (+2.5%) and Central (+1.7%) regions. The density of agritourism businesses throughout the country is very high, with 8.6 structures per 100 km<sup>2</sup>, with the highest proportions in Trentino-South Tyrol, Tuscany and Umbria. In 2022 there was an important upturn in the presence of foreign visitors (+73%) and a significant increase in Italian visitors (+11.5%), totalling 15.5 million presences (+29.2%). The current value of agritourism production is €1,517 million



**84%** located in mountain and hill areas



**81.2%** offering accommodation



**50%** offering catering



**ITALIAN FOOD AND WINE TOURISTS:**  
**9.6 MILLION**



**+16%**  
compared to 2022

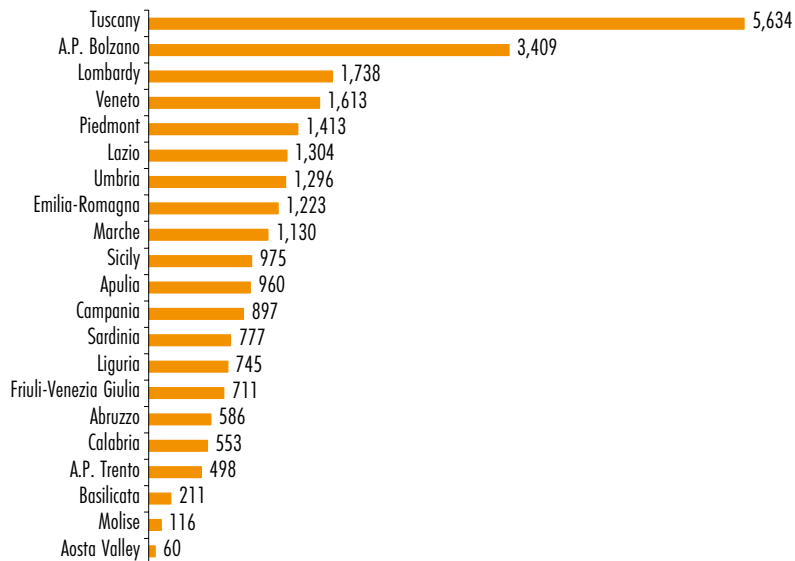
**Wine tourism reaches a turnover of**  
**€2.9 BILLION**

(+30.6% compared to 2021), equivalent to over €58,686 euro per business (ISTAT data). According to ISTAT, in 2023 the share

of food and wine-related activities, specifically tours and tastings, in the trips of Italian residents rose to 25.3% (it was 18.1% in 2022). More-

over, more than half of Italian tourists (58%) made at least one trip in 2023 with food and wine as the main motivation (Italian Food and Wine Tourism Report).

**Agritourism businesses by region, 2022**



Source: ISTAT

## FOOD WASTE

Over 4.2 million tonnes of agri-food products were lost or wasted in 2023 throughout the supply chain in Italy. The value of FLW (+8.1% compared to 2022) exceeds €13 billion, even €20 billion when including the consumption of soil, water and energy needed for their production, processing and distribution.

Waste at the food processing stage was reduced by 13.2% compared to 2022, as 80% of businesses adopted circular economy practices: these businesses donated or reused 321,000 tonnes of surpluses (Food Sustainability Observatory, Politecnico di Milano). FLW at the distribution stage also decreased in 2023 (-7.5%), while domestic waste, which holds the highest share, increased by 8.3%.



**FOOD WASTE  
FOOD LOSSES AND  
WASTE (FLW)**

**4.2 MILLION TONNES  
OF AGRI-FOOD PRODUCTS  
€13.1 BILLION**



**27 KG OF FOOD  
PER CAPITA ON AVERAGE**



**26.9% OF FLW OCCURS IN THE AGRICULTURAL PRODUCTION STAGE**



**24.3% IN PROCESSING**



**7.4% IN DISTRIBUTION**



**41.4% IN DOMESTIC CONSUMPTION**

Source: Waste Watcher International Observatory 2024





# ENVIRONMENT

Climate and water supply

Land consumption

Agricultural and forestry sector emissions

Forestry

Use of chemical products

## CLIMATE AND WATER SUPPLY

In 2023, the strong temperature and rainfall anomalies already noted in 2022 continued, with a further intensification, particularly for temperatures, confirming the climate change underway.

At national level, the minimum and maximum temperatures were far above the 1991-2020 climate average (+1.2 and +1.4 °C respectively). The hottest month compared to the standard was October (+3 °C on average), while April and May were the coldest (-0.8 °C on average).

The annual precipitation was within the standard at national level (982 mm) while it was below average again in Piedmont and Liguria and in Sicily (around -15%). The anomalies are much more significant when analysing the monthly distribution of precipitation, with values halved or almost halved in the first three months in the North-West (down to a minimum of -46%



### WARMER THAN EVER IN 2023

+ 1.2 °C MINIMUM  
TEMPERATURES  
+ 1.4 °C MAXIMUM  
TEMPERATURES



### ANNUAL PRECIPITATION

IN THE NORMAL RANGE, BUT HIGHLY  
ABNORMALLY DISTRIBUTED OVER THE  
DIFFERENT MONTHS OF THE YEAR

FEBRUARY -46 %  
SEPTEMBER -44 %  
DECEMBER -40 %

MAY  
+131 % at national level  
+191 % Emilia-Romagna  
+296 % Sicily

in Piedmont). As a national average, the driest months were February (-46%), September (-44%) and December (-40%); in October, rainfall was reduced by as much as 87% in Sicily and in December by around



### WATER AVAILABILITY IN AGRICULTURE

MORE DROUGHT in the North-West until April

EXTREME DROUGHT in December on the Islands and in Apulia

EXCESS OF HUMIDITY at the height of the growing season throughout peninsular Italy and in Sicily



### EXTREME RAINFALL

22% of total annual rainfall at national level

33% in Emilia-Romagna and  
31% in Lombardy, Friuli-Venezia  
Giulia and Marche

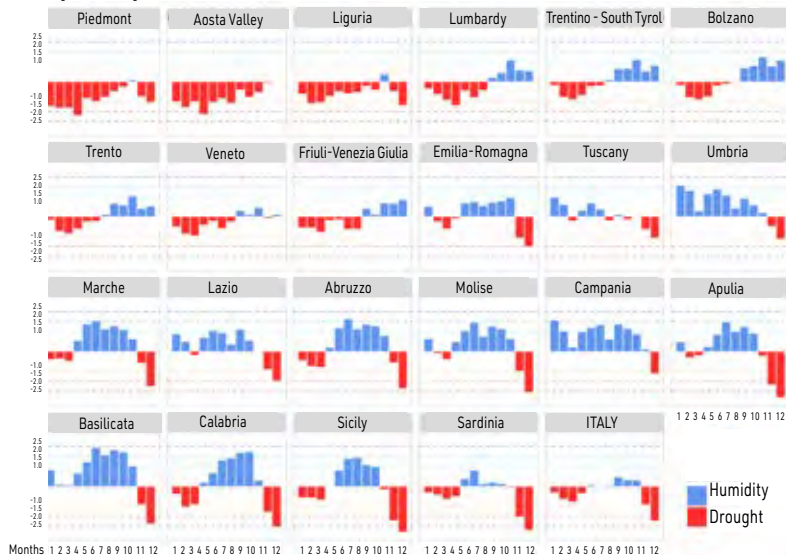
70% in Basilicata, Calabria and Sicily. On the contrary, between May and June there was a generalised excess of rainfall (+131% at national level), reaching a maximum value in Emilia-Romagna (256 mm,

equal to +191%).

In terms of water availability in agriculture compared to 2022, the picture has completely changed. In the first months of the year, the persistent drought in the North-West continued with moderate/severe intensity until April. Over the whole of the Italian peninsula and Sicily, the spring/summer period was characterised by excess of humidity, while in the last months of the year the situation reversed, also affecting Sardinia with widespread severe/extreme drought conditions.

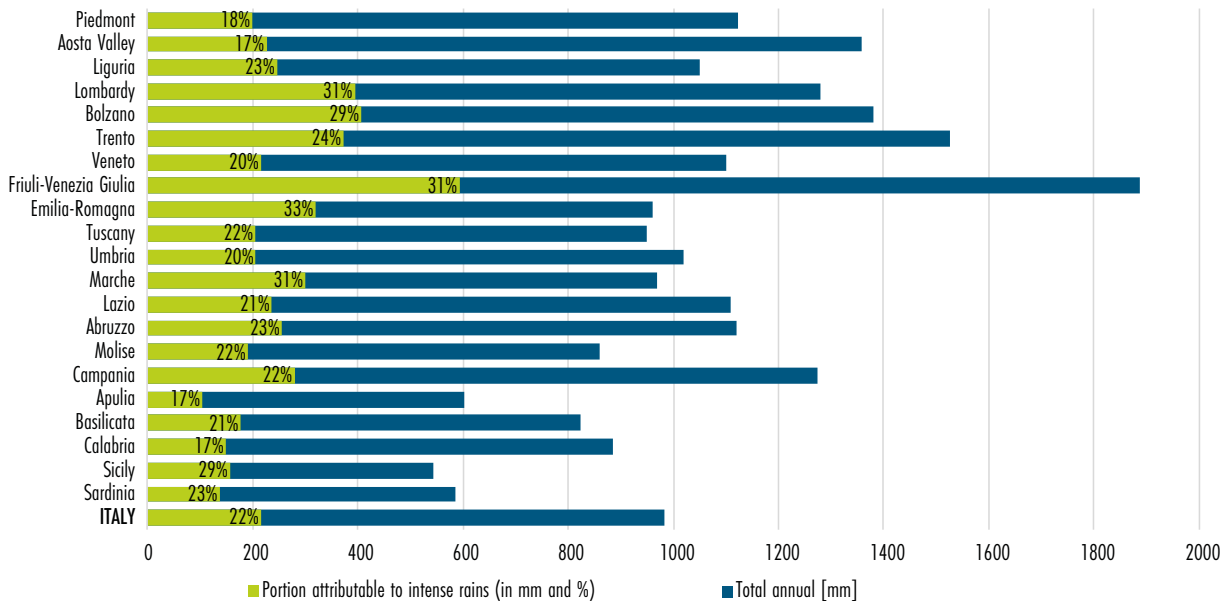
The extreme rainfall index shows that 22% of the total annual rainfall (215 mm) was due to exceptional events. The national value is exceeded by 11 regions, reaching a maximum in Emilia-Romagna with 319 mm (33% of the annual total), followed by Marche (300 mm), Lombardy (394 mm) and Friuli-Venezia Giulia (593 mm).

### Agricultural drought index SPEI-6months (Standardized Precipitation Evapotranspiration Index), 2023



Source: CREA-AA Agro-meteo-climatology Observatory (<https://doi.org/10.5281/zenodo.13740741>)

## Extreme precipitation index (R95pTOT), 2023



Source: CREA-AA Agro-meteo-climatology Observatory (<https://doi.org/10.5281/zenodo.13740741>)

## LAND CONSUMPTION

Land consumption continues to transform the national territory at a high and increasing rate. In 2022 (latest available data) new artificial land cover involved an additional 76.8 km<sup>2</sup>, an average of 21 hectares per day. In the last sixteen years, from 2006 to 2022, Italy has lost 1,216 km<sup>2</sup> of natural or semi-natural land due to urban sprawl and its transformations.

ISPRA data indicate an acceleration of the speed of land consumption by more than 10 % in the two-year period 2021-2022. The level of artificialisation and sealing has thus increased at the expense of natural and agricultural areas.

In all regions there is a more or less important shift from rural to urban and suburban areas, particularly strong in Apulia (-514 km<sup>2</sup>), Emilia-Romagna (-329 km<sup>2</sup>), Lombardy (-310 km<sup>2</sup>), Sicily (-306 km<sup>2</sup>), Veneto (-293 km<sup>2</sup>).



**21 HECTARES  
OF LAND CONSUMPTION  
PER DAY**



**15,000 HECTARES  
OCCUPIED  
BY PHOTOVOLTAIC PLANTS**

### Classes of land consumption (2006-2022)

	Land consumption (ha)	Distribution (%)
Land consumption	121,646	100.0
Permanent land consumption	43,071	35.4
Buildings, constructions	19,290	15.9
Paved roads	9,962	8.2
Railway headquarters	278	0.2
Airports	143	0.1
Ports	68	0.1
Landfills	890	0.7
Reversible land consumption	48,269	39.7
Unpaved roads	1,214	1.0
Construction sites and other earthwork areas	25,330	20.8
Non-renaturated mining areas	5,032	4.1
Quarries in the water table	421	0.3
Ground-mounted photovoltaic plants	15,006	12.3
Other artificial coverings not related to agricultural activities	182	0.1

Source: ISPRA analysis of SNPA data

## AGRICULTURAL AND FORESTRY SECTOR EMISSIONS

The latest available data (National Inventory Report, ISPRA, 2024) show for the agricultural sector a 19% reduction in emissions in 2022, from 32.8 in 2021 to 30.7 million tonnes of CO<sub>2eq</sub>. The reduction is mainly due to N<sub>2</sub>O emissions from agricultural soils (-22.5 %), driven by the reduced use of synthetic fertilisers. Despite this decrease in greenhouse gases released into the atmosphere, the agricultural sector remains the second most polluting sector after the energy sector and followed by the industrial production processes and waste sector.

Methane remains the greenhouse gas that contributes most to the sector's emissions, with about 21 million tonnes of CO<sub>2eq</sub>, followed by N<sub>2</sub>O emitted at about 8 million tonnes of CO<sub>2eq</sub>.

Methane emissions are mainly due to



### THE AGRICULTURAL SECTOR PRODUCED

**30.7** MILLION TONNES OF CO<sub>2eq</sub>  
OF WHICH AROUND  
**21** MILLION TONNES OF METHANE GAS



### THE FORESTRY SECTOR ABSORBED

**24.26** TONNES OF CO<sub>2eq</sub>  
**-75,7%** COMPARED TO 2021

enteric fermentation (70%), followed by manure management (22%) and finally rice growing (8%).

## LULUCF

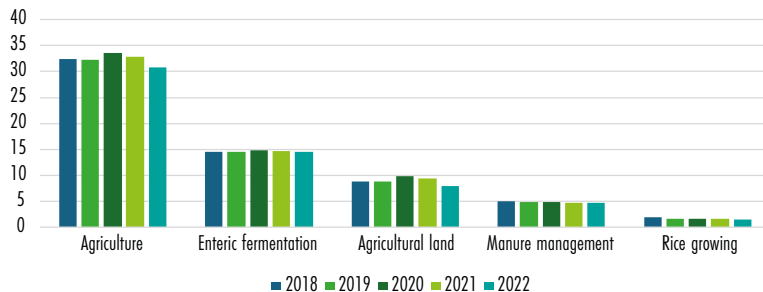
The LULUCF sector was able to compensate for half of its absorption capacity, from 40.9 in 2021 to 20.4 million tonnes of CO<sub>2eq</sub> in 2022, mainly due to the increased area of forest and grassland fires.

The forest category (Forestland) absorbed 94.5 % of CO<sub>2eq</sub> due to removals by living biomass, the remaining CO<sub>2</sub> was absorbed by the permanent grassland sector (Grassland).

The most emissive sector remains urban land use (Settlement), which, like last year, emitted around 5 million tonnes of CO<sub>2eq</sub> into the atmosphere.

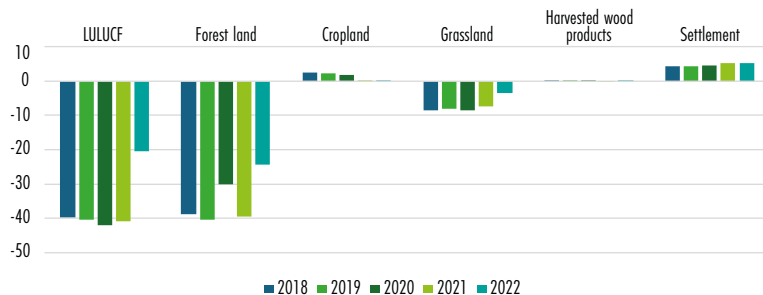
The other categories of the LULUCF sector, namely agricultural soils, wetlands and wood products, together emit about 0.5 million tonnes CO<sub>2eq</sub>.

### Agricultural sector emissions (MtCO<sub>2e</sub>)



Source: National inventory of greenhouse emissions

### LULUCF sector emissions/absorption (MtCO<sub>2e</sub>)



Source: National inventory of greenhouse emissions

## FORESTRY

The new Forest Map of Italy provides an estimate of about 10 million hectares of forest area, confirming the 2015 data from the last forest inventory and the growth of forest area in our country.

This growth is mostly due to the progressive depopulation of mountain areas, the reduction of forest utilisation activities and the abandonment of areas historically occupied by agricultural and pasture activities. While positive, especially with regard to the renaturalisation of anthropised areas, it also entails several negative consequences, such as the increase in potentially combustible biomass in the event of forest fires, floating biomass in the event of floods and overflows, the disappearance of agroforestry ecosystems and traditional landscapes, and the spread of invasive allochthonous species.



**10 million**  
HECTARES OF WOODS



**INDEX OF  
WOODLANDS:  
33.4%**

**HIGHER IN TUSCANY (88%)**

**LOWER IN APULIA (6.1%)**

**88,804 hectares** of land affected  
by fires in 2023

**of which 41,743 hectares** of wooded land (+18%)



Over the last 20 years, the surface area covered by woods has grown in every region, with Tuscany exceeding one million hectares and having the highest woodland index, i.e. the

percentage ratio between woods and regional surface area. Apulia, on the other hand, has the lowest woodland rate.

## National forested surface area

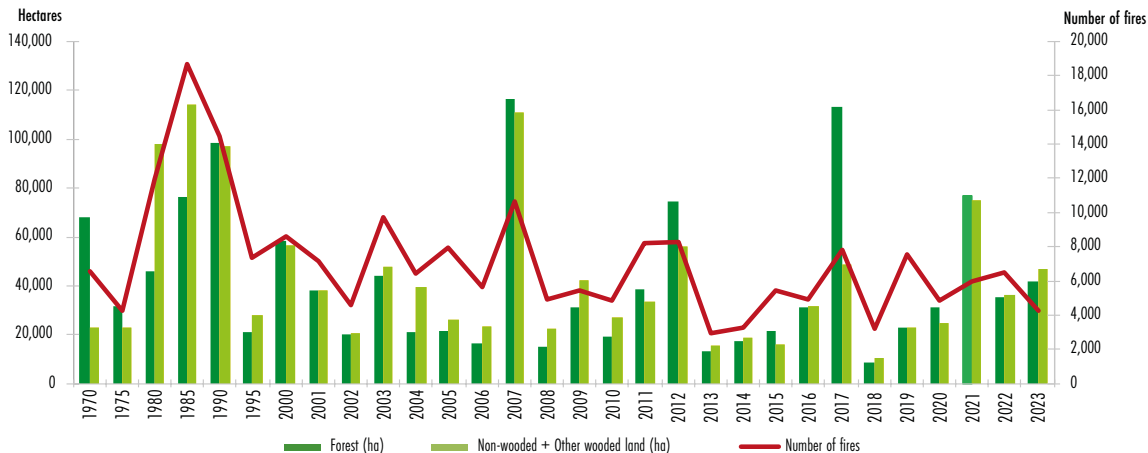
	INFC* 2005		INFC* 2015		CFI** 2020	
	Surface area (ha)	Index of woodland (%)	Surface area (ha)	Index of woodland (%)	Surface area (ha)	Index of woodland (%)
Piedmont	839,733.3	33.1	869,773	34.3	980,555.9	38.6
Aosta Valley	98,327.6	30.2	99,243	30.5	104,143.3	32.0
Lombardy	578,126.3	24.2	596,836	25.0	677,088.3	28.4
Liguria	335,282.9	61.9	342,793	63.3	394,149.2	72.8
A.P. Bolzano	332,425.9	44.9	339,270	45.9	357,933.7	48.4
A.P. Trento	372,879.1	60.1	373,259	60.1	398,476.3	64.2
Veneto	395,459.7	21.6	411,427	22.4	452,296.2	24.7
Friuli Venezia Giulia	316,223.6	39.8	323,362	40.7	353,845.8	44.6
Emilia-Romagna	552,068.5	24.5	578,852	25.7	633,201.1	28.1
Tuscany	1,007,645.7	74.1	1,028,665	75.6	1,201,539.2	88.3
Umbria	368,186.5	43.5	383,928	45.4	382,469.6	45.2
Marche	290,179.8	31.1	284,904	30.5	304,414.2	32.6
Lazio	534,897.8	31.0	558,060	32.4	617,868.7	35.9
Abruzzo	389,162.3	35.9	408,616	37.7	418,554.6	38.7
Molise	131,420.4	29.5	150,533	33.8	152,519.8	34.2
Campania	380,002.3	27.8	400,763	29.3	491,571.8	36.0
Apulia	143,049.6	5.9	142,248	5.9	147,618.3	6.1
Basilicata	257,980.0	25.6	286,498	28.5	333,159.6	33.1
Calabria	457,892.4	30.1	492,771	32.4	634,969.5	41.7
Sicily	253,707.7	11.0	284,731	12.4	359,432.5	15.6
Sardinia	548,316.9	21.2	600,255	23.2	704,520.2	27.3
Italy	8,582,968.2	28.4	8,956,787	29.7	10,100,327.4	33.4

\* National forest and carbon sink inventory

\*\* Forest Map of Italy

Source: analysis of SINFor data

## Burned surface areas and number of fires from 1970 to 2023



Source: analysis of Nucleo Investigativo Antincendio Boschivi (NIAB) data and SinFor data

In 2023 the total area affected by fires was 88,804 hectares, almost 20,000 hectares more than the previous year. The number of fires was

lower (4,265 instead of 6,529), but the average area almost doubled (from 10.9 to 20.8 ha/fire).

These fires affected a wooded area

of 41,743 hectares (+18%) and 47,061 hectares of non-wooded area (+30%).

## USE OF CHEMICAL PRODUCTS

In 2023, the fertiliser industry continued to face rising fertiliser prices as a result of difficulties in sourcing products and raw materials due to the war in Ukraine. In the first half of the year, despite lower energy costs, fertiliser prices remained stable, showing a decrease in the volume of sold fertilisers of -18.6% compared to the first half of 2022 (Federchimica Assofertilizzanti). In the following months, the increase in sales moderated the annual variation, which, although still negative, was limited to 7.2%. Consumer sales of simple solid mineral fertilisers fell by 5.1%, while sales of compound solid mineral fertilisers were positive (+8%); mineral fertilisers based on micronutrients or meso-elements fell by more than 4%. Solid organic fertilisers were also down, by 22.9%, as were fertilisers that can be used in organic farming (-18.2%). The market segment of biostimu-

lants, products that can intervene in the various physiological processes of plants, including improving resistance to abiotic stresses, bucked the trend with stable consumption. Despite the decline in sales of the various types of fertiliser, actual consumption of the main nutrients (nitrogen, phosphorus and potassium) increased from 658,000 tonnes to 706,000 tonnes (+7.3). Nitrogen consumption increased by 11.4%, phosphorus by 4.1%, only potassium decreased by 5%.

Plant protection products, according to the latest available data from the ISTAT survey for 2022, recorded a decrease in their use of 11.6% with a total volume of 102,895 tonnes (13,530 tonnes less than in 2021). The decline in consumption affected all categories, but the sharp drop in fungicides (-10.3%) had a strong impact on the sector's trend, as they represent the predominant share



### USE OF CHEMICAL PRODUCTS

#### NUTRIENTS (2023)

**706,000 t (+7.3%)**

##### NITROGEN

**460,000 t (+11.4%)**

##### PHOSPHORUS

**151,000 t (+4.1%)**

##### POTASSIUM

**95,000 t (-5%)**



#### PLANT PROTECTION PRODUCTS (2022)

**102,895 t (-11.6%)**

##### FUNGICIDES

**49,134 t (-10.3%)**

##### INSECTICIDES, ACARICIDES

**23,051 t (-6.4%)**

##### HERBICIDES

**15,784 t (-23.5%)**

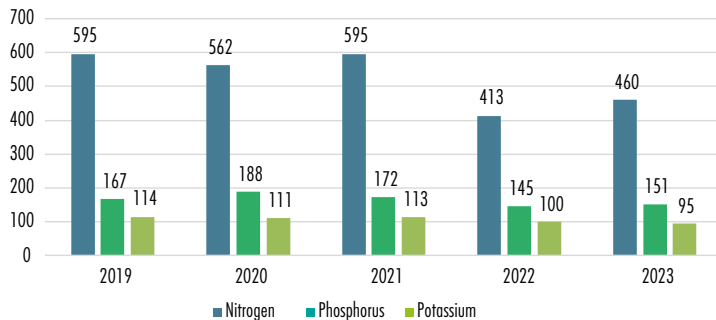
##### MISCELLANEOUS

**14,925 t (-8.8%)**



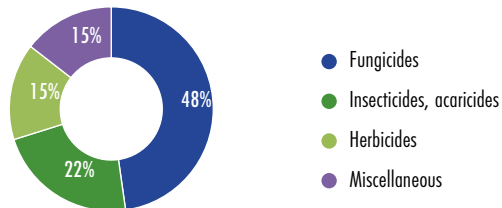
(48%). They are followed in terms of weight in the sector by insecticides and acaricides (22%), with a drop of 6.4%, and herbicides, which fell sharply (-23.5%) to 15%.

### Nutrient consumption in Italy (000 t), 2023



Source: Assofertilizzanti

### Composition of plant protection products used 2022



Source: ISTAT.

# AGRICULTURAL POLICY

Common Agricultural Policy – general framework

CAP Pillar I

CAP Pillar II

Regional Expenditure

National policy

## COMMON AGRICULTURAL POLICY-GENERAL FRAMEWORK

The resources earmarked for Italy for the implementation of the CAP in 2023 amount to a total of €4.9 billion, representing 9% of the EU-27's total agricultural expenditure. The largest item is pillar I, which includes resources for direct payments and expenditure related to markets and sectoral interventions (72.1%). Rural development (considering only EU funding) stands at just under 28%. Compared to the EU average distribution, Italy accords rural development a higher relative importance.

2023 represents the first year of implementation of the CAP Strategic Plan, the programming document that, with the 2023-2027 reform, encompasses all interventions under both pillar I and pillar II. The expenditure actually incurred in 2023 only minimally captures

this novelty, as it essentially refers to measures and interventions from the 2014-2022 programming period and to the last payments of the Recovery and Resilience Instrument (EURI).

Direct payments are the priority expenditure item in almost all EU countries, with the exception of Malta and Slovenia.

In response to the farmers' protests that inflamed the European public squares at the beginning of 2024, some changes to the regulatory framework of the CAP Strategic Plan were initiated. Regulation No. 1468 of 14 May 2024 revised some of the cross-compliance rules and gave Member States the possibility to increase amendments to the PHP.



**CAP RESOURCES  
FOR ITALY  
IN 2023**

**4.9** BILLION

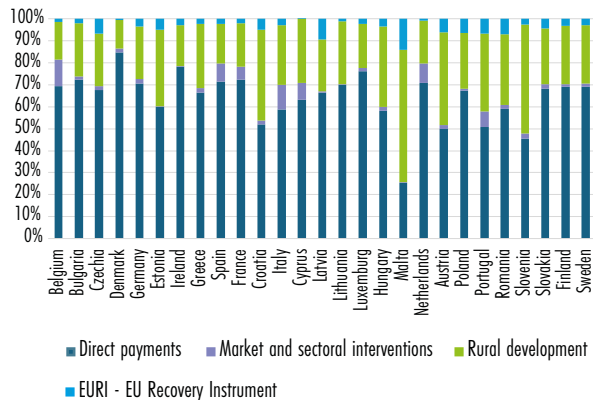
**9%**  
OF AGRICULTURAL  
EXPENDITURE IN THE EU-27



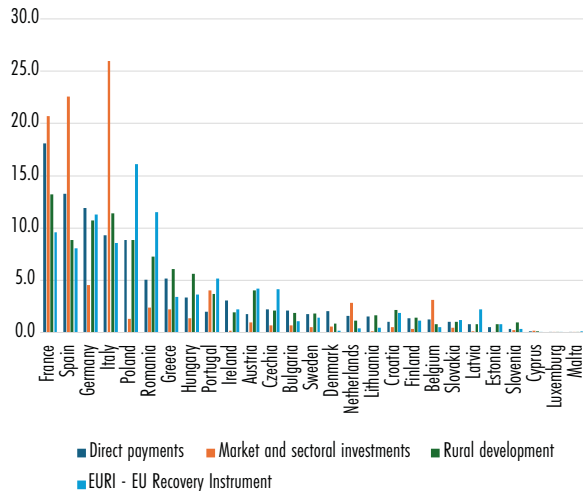
**72.1%** PILLAR I  
OF CAP

**27.9%** PILLAR II  
OF CAP

**% distribution of CAP payments made by category of expenditure in each EU-27 member state, 2023**



**% distribution of payments made for each category of CAP expenditure between EU-27 member states, 2023**



Source: analysis of European Commission data

Source: analysis of European Commission data

## CAP PILLAR I

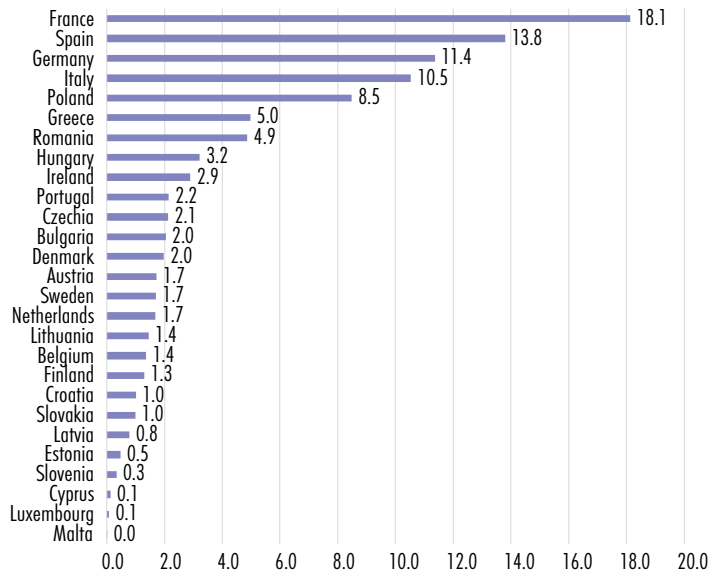
With just short of €7.5 billion, France is the main beneficiary of the EAFG (pillar I expenditure), followed by Spain (approximately €5.7 billion) and Germany (€4.7 billion). Italy remains in fourth place with resources totalling €4.3 billion (10.5% of the EU-27 total), remaining stable compared to 2022.

82% of pillar I resources received by Italy are due to direct payments, which are totally related to expenditure and payment types in the 2014-



**ITALY REMAINS FOURTH IN THE EU FOR EAGF EXPENDITURE WITH A SHARE OF 10.5%, THE EQUIVALENT OF €4.3 BILLION**

**% distribution of EAFG by EU-27 Member State, 2023**



Source: analysis of European Commission data

2022 programming period. The basic payment represents the most important item, accounting for more than half of direct payment expenditure and 45% of all EAGF expenditure. It is followed in importance by the green payment and voluntary coupled support. The other pillar I component accounts for 16% of expenditure. This includes both the market-related expenditure of the old programming and the sectoral interventions of the 2023-2027 CAP. With €338 million, fruit and vegetables explain 7.8% of EAGF expenditure, accounting for about 1/3 of the total EU expenditure on this sector. Wine products follow, with €276 million and a weight of 6.4%.

In 2022, the beneficiaries of direct payments in Italy were 746,500, 12.6% of the beneficiaries in the EU-27. Half of the beneficiaries received less than €1,250 per year and another 30.4% between €1,250 and €5,000. These two classes, together,

### EAGF expenditure by intervention type, 2023

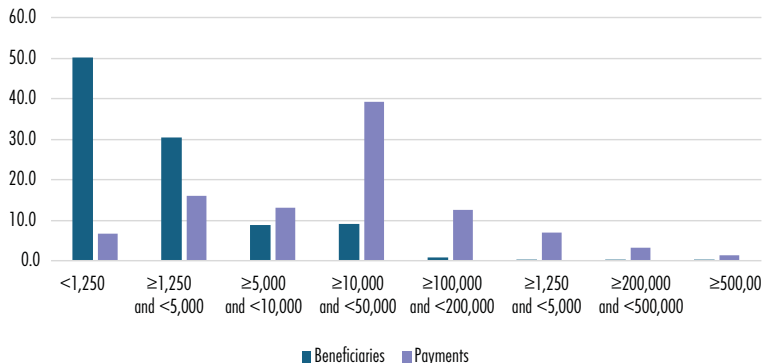
	Italy		EU-27		Italy/EU
	€mln	%	€mln	%	%
Spending connected to the market and sectoral interventions	694.3	16.0	2,674.1	6.5	26.0
- Olive oil	29.3	0.7	34.5	0.1	84.9
- Fruit and vegetables	338.4	7.8	1,056.0	2.6	32.0
- Wine products	275.8	6.4	977.1	2.4	28.2
- Bee farms	4.7	0.1	44.4	0.1	10.6
- Programmes for schools	21.4	0.5	170.9	0.4	12.5
- Other	24.6	0.6	391.2	1.0	6.3
Direct payments	3,551.9	82.0	38,161.7	92.8	9.3
- Basic payments	1,951.1	45.0	14,826.3	36.0	13.2
- Green payments	1,023.2	23.6	10,898.3	26.5	9.4
- Young farmer payments	63.8	1.5	459.1	1.1	13.9
- Voluntary coupled support	429.4	9.9	4,079.7	9.9	10.5
- Small farmers	42.9	1.0	608.7	1.5	7.1
- Other	41.5	1.0	247.0	0.6	16.8
Administrative costs, rectifications and other	87.4	2.0	297.9	0.7	29.3
EAGF TOTAL	4,333.6	100.0	41,133.6	100.0	10.5

Source: analysis of European Commission data

account for 80% of the beneficiaries but only 23% of the direct payments. In contrast, the 1.2% of farms re-

ceiving payments over 50,000 annually concentrate another 24% of direct payments.

### % distribution of direct payments and beneficiaries by payment class in Italy, 2022

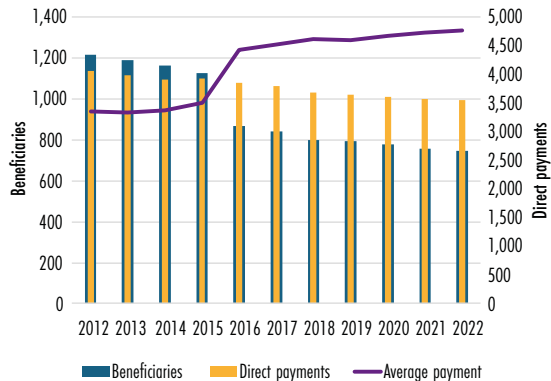


Source: analysis of European Commission data

Between 2012 and 2022, both the number of beneficiaries of direct payments in Italy (-38%) and the amount of resources received (-13%) decreased.

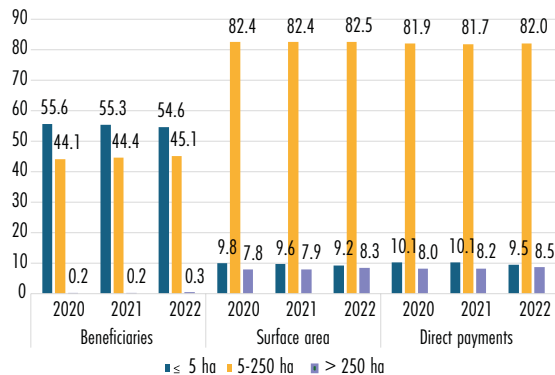
55% of Italian farms receiving direct payments are smaller than 5 hectares. They account for more than 9% of the area and about 10% of the payments. 45% of the holdings have a size between 5 and 250 hectares, accounting for 82% of the beneficiary area and payments. Holdings larger than 250 hectares account for 0.3% of the total, but concentrate 8% of the surface area and payments.

**Beneficiaries (,000), direct payments (€ mln) and average payment in Italy (€/farm)**



Source: analysis of European Commission data

**% distribution of direct payments, beneficiaries and surface area by farm size class in Italy**



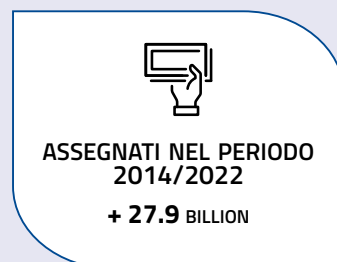
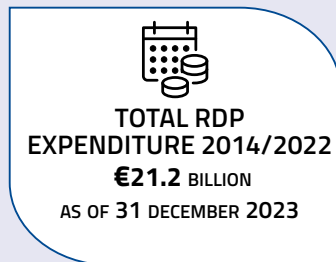
Source: analysis of European Commission data

## CAP PILLAR II

Pending the full implementation of the 2023-2027 reform, as of 31 December 2023 the financial resources used to support rural development interventions in Italy amounted to a total of €21.2 billion, €10.7 billion of which came from the EU budget; the capacity of Italian RDPs to absorb the appropriations allocated for the 2013-2022 period came to 76.2%.

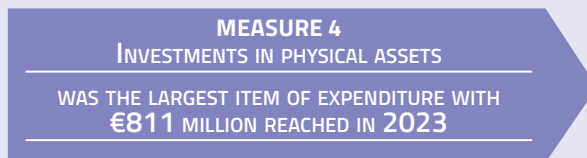
Over the course of the year 2023, public contributions were dispensed in the amount of €2.75 billion, which allowed the annual spending target to be fulfilled.

The largest component of public spending in 2023 was related to interventions in support of farm and infrastructure investments within the scope of Strategic Priority 2 'Enhancing farm competitiveness and profitability', amounting to €732 million, corresponding to 29.4% of the total. This was followed by interven-



**Expenditure 2023**  
**2.9 billion**

**35% of which**  
on environmental and  
landscape interventions



**28%**  
OF THE TOTAL  
CONTRIBUTIONS  
DISPENSED

tions under Strategic Priority 4 'Restoring, preserving and enhancing ecosystems related to agriculture and forestry' at €705 million (28.3%) and Priority 3 'Promoting food chain

organisation, animal welfare and risk management' at €580 million (23.3%).

In terms of individual intervention types, those which contributed most

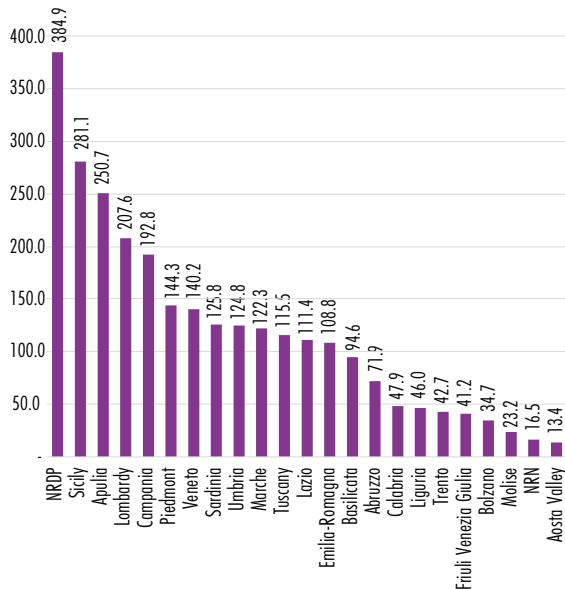
**RDP 2014/2022: allocations and public expenditure (€ mln)**

	Allocations 2014-2022	2023 expenditure	Total expenditure as of 31 december 2023	Financial progress (%)
	a	b	c	d = c/a
Piedmont	1.457,8	144,3	1.089,0	74,7
Aosta Valley	182,2	13,4	156,0	85,6
Lombardy	1.543,4	207,6	1.185,9	76,8
Liguria	414,3	46,0	273,9	66,1
Bolzano	486,2	34,7	432,4	88,9
Trento	400,2	42,7	304,8	76,2
Veneto	1.561,2	140,2	1.251,5	80,2
Friuli Venezia Giulia	398,6	41,2	307,1	77,0
Emilia-Romagna	1.583,1	108,8	1.211,6	76,5
Tuscany	1.291,6	115,5	934,7	72,4
Umbria	1.195,3	124,8	885,7	74,1
Marche	882,6	122,3	643,1	72,9
Lazio	1.105,2	111,4	859,6	77,8
<b>Total for more developed regions</b>	<b>12.501,9</b>	<b>1.252,9</b>	<b>9.535,5</b>	<b>76,3</b>
Abruzzo	638,7	71,9	450,8	70,6
Molise	281,8	23,2	221,4	78,6
Sardinia	1.729,3	125,8	1.361,7	78,7
<b>Total for transition regions</b>	<b>2.649,8</b>	<b>220,9</b>	<b>2.034,0</b>	<b>76,8</b>
Basilicata	889,8	94,6	626,4	70,4
Calabria	1.452,5	47,9	1.079,2	74,3
Campania	2.373,9	192,8	1.781,3	75,0
Apulia	2.160,5	250,7	1.528,3	70,7
Sicily	2.885,6	281,1	2.078,5	72,0
<b>Total for less developed regions</b>	<b>9.762,3</b>	<b>867,1</b>	<b>7.093,6</b>	<b>72,7</b>
National Rural Develop. Programme	2.860,3	384,9	2.468,3	86,3
National Rural Network	130,0	16,5	111,7	85,9
<b>Overall total</b>	<b>27.904,4</b>	<b>2.742,3</b>	<b>21.243,1</b>	<b>76,1</b>

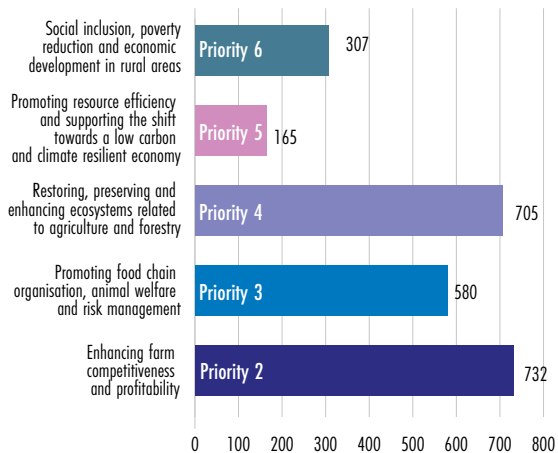
Source: analysis of NRN data

to meeting the annual spending target were: measure M4 'Investments in physical assets' at around €811 million, representing 28% of the total public aid dispensed, and measures M17 'Risk management' at €294 million (10%), and measure M10 'Agri-environment-climate payments' at €281 million (9.6%). Spending on exceptional temporary support for farmers and SMEs particularly affected by the impact of the Russian invasion of Ukraine (M22) is worth €68 million (2.5%).

### Distribution by public spending programme (€ mln), 2023



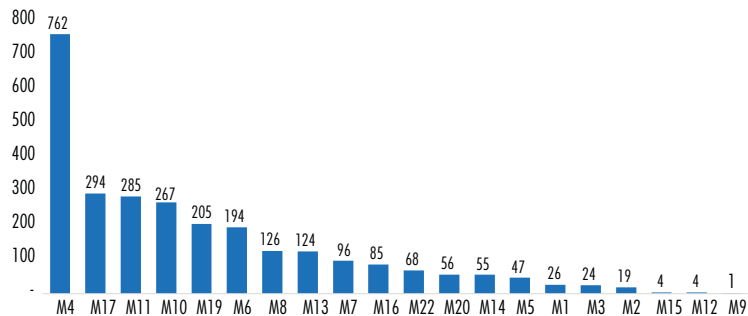
### Distribution of public expenditure by strategic priority (€ mln), 2023



Source: analysis of NRN data

Source: analysis of NRN data

## Distribution of public expenditure by measure (€ mln), 2023



Source: analysis of NRN data

## Measure Description

Measure	Description
M1	Knowledge transfer and information actions
M2	Advisory services, farm management and relief services
M3	Quality schemes for agriproducts and foodstuffs
M4	Investments in physical assets
M5	Restoring production potential and preventing damage
M6	Farm and business development
M7	Basic services and village renewal in rural areas
M8	Investments in forest area development and improvement of the viability of forests
M9	Setting up of producer groups and organisations
M10	Agri-environment-climate payments
M11	Organic farming
M12	Natura 2000 and Water Framework Directive payments
M13	Payments to areas facing natural or other specific constraints
M14	Animal welfare
M15	Forest-environmental and climate services and forest conservation
M16	Cooperation
M17	Risk management
M19	LEADER
M20	Technical Assistance
M22	Exceptional temporary support to farmers and SMEs particularly affected by the impact of the Russian invasion of Ukraine

## REGIONAL EXPENDITURE

Analysis of the data on expenditure in regional budgets reveals that the total amount of payments for the agricultural sector in 2022 increased from 2021, coming to just over €2.5 billion.

The regions with the highest proportions of payments to the sector as percentages of regional value added include Aosta Valley (44.1%), Sardinia (21.8%), Friuli-Venezia Giulia (17.6%) and Calabria (16.7%). Regional expenditure accounts for 15.2% of the total support to the agricultural sector.



**REGIONAL INTERVENTIONS IN SUPPORT OF THE AGRICULTURAL SECTOR**

**PROPORTION OF PAYMENTS FOR THE AGRICULTURAL SECTOR/TOTAL PAYMENTS IN THE REGIONAL BUDGETS**

**1.5% ON AVERAGE**



**25.0%**



**Technical assistance and research  
€628 million**

**16.2%**



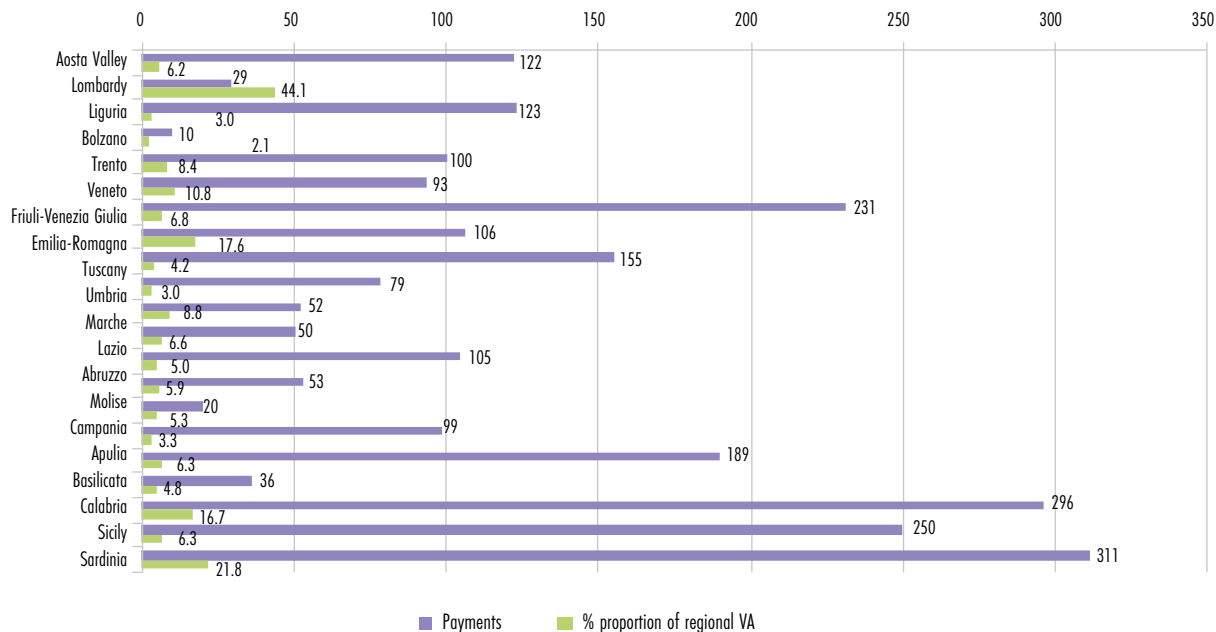
**Forestry activities  
€407 million**

**16.2%**



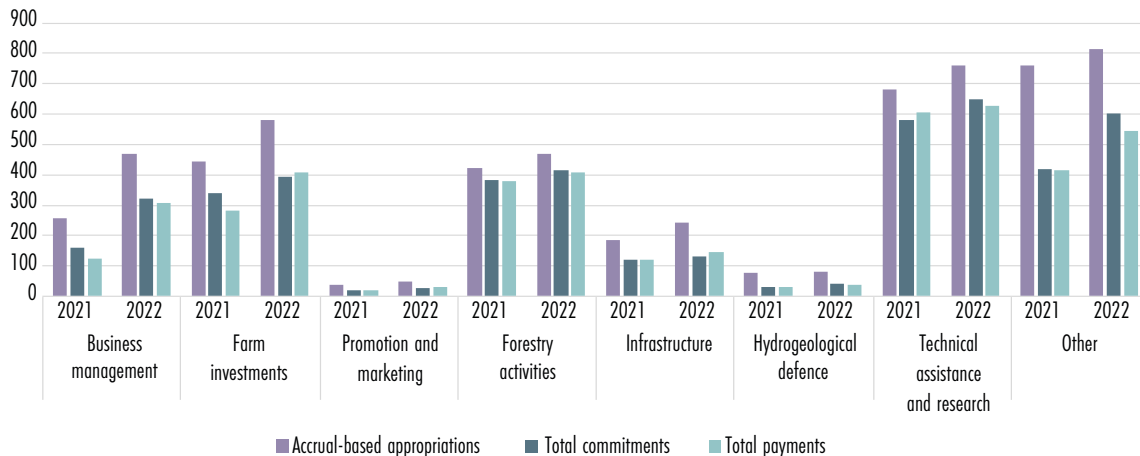
**Farm investments  
€408 million**

## Payments to the agricultural sector (€ mln) and % proportion of regional agricultural value added



Source: CREA - Policies and Bioeconomy

## Agricultural funding by economic-functional use



Source: CREA - Policies and Bioeconomy

## NATIONAL POLICY

### **2024 Budget Law: Agri-food**

The 2024 budget law for agriculture (Law 213/2023) is characterised by a series of measures aimed at tackling emergency situations; in fact, it introduces a new fund to support agricultural, agri-food, livestock and fishing enterprises, with a significant allocation of financial resources and, at the same time, provides for an extension of the objectives of the National Solidarity Fund to support agricultural enterprises and aquaculture and fishing consortia to deal with exceptional spreading events of invasive alien species.

As part of the budgetary manoeuvre, there is no longer the Irpef exemption on the dominical and agrarian

incomes of land managed by direct farmers and professional agricultural entrepreneurs. From 2024, the consideration received for the creation of a surface right on agricultural land will be subject to progressive Irpef taxation.

Finally, there is a substantial allocation for research and experimentation activities under the responsibility of MASAF, in particular for agricultural research and experimentation carried out by national bodies, institutes and laboratories, for the collection, processing and dissemination of information and data, including the National Agricultural Information System, for the support of national associations

and unions of agricultural producers, for the genetic improvement of plants and livestock, for the protection and improvement of the quality of agricultural products and for the prevention and repression of fraud, as well as for the support of national forestry policies.

The identified interventions - which range from fiscal measures to the valorisation of agricultural supply chains and support measures for the agri-food, forestry and fishing sectors - can be reclassified under the 17 Sustainable Development Goals of Agenda 2030 and are provided in the following.



## 1 NO POVERTY

- A fund for the purpose of distributing food parcels consisting of unsold products from food retail to people in extreme poverty in metropolitan areas (article 1, paragraph 6); €1.55 billion for 2024
- A fund for the purpose of assisting people with an Equivalent Economic Status Index of no greater than €15,000 to purchase essential foodstuffs (article 1, paragraph 2); €1.1 billion for 2024



## 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE

Funding of activities falling within the responsibility of MASAF for agricultural research and experimentation, pursuant to article 4 of Law No.

499/1999 (article 1, paragraph 447).  
€10 million for 2024



## 10 REDUCED INEQUALITIES

Extension of the provisions on the revaluation of the purchase values of participations traded and not traded in regulated markets or in multilateral trading systems and of building land and land for agricultural use also to assets owned as of 1 January 2024 by providing, also for such transactions, a substitute tax at a rate of 16% (article 1, paragraphs 52-53)



## 13 CLIMATE ACTION

- New fund for the management of

emergencies in agriculture generated by unforeseeable events, aimed at supporting investments by enterprises operating in the agricultural, agri-food, livestock and fishing sectors (article 1, paragraphs 443-445); €100 million for 2024.

- Extension of the National Solidarity Fund to events of exceptional spread of invasive alien species, for the benefit of aquaculture and fishing enterprises and consortia (article 1, paragraph 446) (amendments to Decree Law No. 102/2004 on interventions to support agricultural enterprises)





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## NORTH-WEST

Piedmont  
Aosta Valley  
Lombardy  
Liguria

## NORTH-EAST

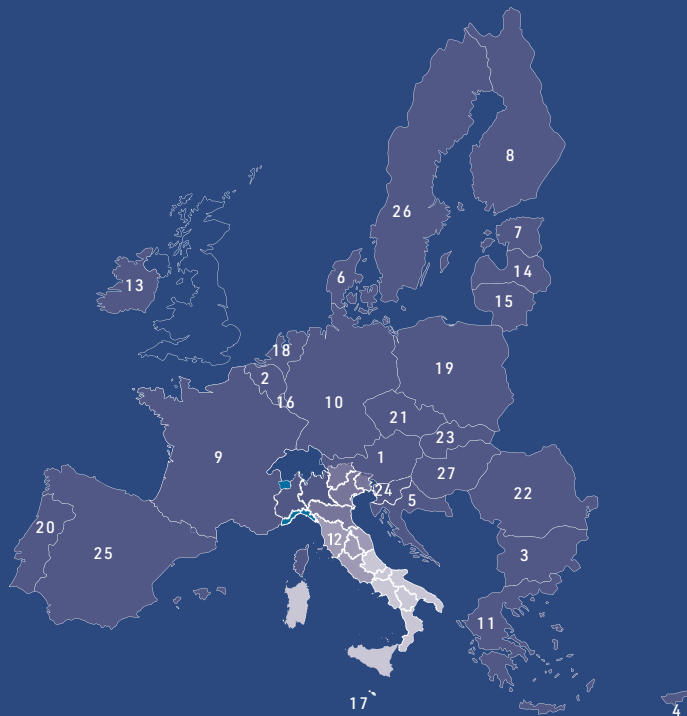
Trentino-South Tyrol  
Veneto  
Friuli-Venezia Giulia  
Emilia-Romagna

## CENTRE

Tuscany  
Umbria  
Marche  
Lazio

## SOUTH and ISLANDS

Abruzzo  
Molise  
Campania  
Apulia  
Basilicata  
Calabria  
Sicily  
Sardinia



## EU COUNTRIES

- 1 Austria (€)
- 2 Belgium (€)
- 3 Bulgaria
- 4 Cyprus (€)
- 5 Croatia (€)
- 6 Denmark
- 7 Estonia (€)
- 8 Finland (€)
- 9 France (€)
- 10 Germany (€)
- 11 Greece (€)
- 12 Italy (€)
- 13 Ireland (€)
- 14 Latvia (€)
- 15 Lithuania (€)
- 16 Luxembourg (€)
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- 22 Romania
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- 25 Spain (€)
- 26 Sweden
- 27 Hungary



**ITALIAN AGRICULTURE IN FIGURES 2024**  
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